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ABSTRACT

This manual was prepared to assist managers of information and referral (I&R) services to develop and maintain an adequate file of resources for the I&R center. Topics covered include preliminary planning, time estimates for set-up and file up-dating; the concept of recruiting volunteers to help operate the center and training that would be needed; descriptions of several currently operating systems for gathering and organizing information for rapid and accurate retrieval; the identification of community agencies and the services they provide, and how staff should approach these organizations to explain the I&R service and also gather important referral information; procedures for contacting private practitioners; a filing system that could be used in an I&R center; how the resource file can be made more flexible; and procedures to be followed in using and updating the resource file. The appendix contains copies of questionnaires, file forms, form letters, and flow charts. (JAB)

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INFORMATION AND REFERRAL SERVICES: The Resource File

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Project Director
May 1973

Other publications available from InterStudy

I&R Services: An Annotated Bibliography (June 1972)

WIS: An I&R Network (December 1972)

Wisconsin Information Service Newsletter (monthly)

Publications by InterStudy available from the Administration on Aging Office of Human Development Department of Health, Education, and Welfare

I&R Centers: A Functional Analysis (1971)

I&R Services: Reaching Out (1973)

I&R Services: Information Giving (working draft; being revised by InterStudy for formal publication under the title *Information-Giving and Referral* in late 1973)

I&R Services: Referral Procedures (working draft)

I&R Services: Volunteer Escort Services (working draft)

I&R Services: Follow-up (working draft)

I&R Services: The Role of Advocacy (working draft)

I&R Services: A Training Syllabus (working draft)

I&R Services: A Guide for State and National Administrators (working draft)

FOREWORD: Using This Manual

At the present time there is a surge of interest in information and referral (I&R) services. This manual is part of a series of publications that is intended to respond to that interest and to provide a solid base for a comprehensive approach to the promises and the problems of I&R services. *The Resource File* has been written for the I&R center managers who are responsible for the administration of the work necessary to develop and maintain the centers' **resource files.*** It has been prepared to fill a critical need: to provide detailed procedures of a method for gathering, storing, and retrieving information about human services. Each of these processes has unique problems associated with it.

Gathering information

The major problem in gathering information about human services lies in the availability of suitable questionnaires, forms, survey booklets, and other kinds of instruments for surveying and cataloging services. Some are very general and ask only that a facility director describe the services provided by his staff; the I&R worker then translates this description into generalizable terms according to some kind of classification system. Other instruments are highly structured, requiring only that the facility director check "yes" or "no" with regard to detailed questions about service categories. Examples of different kinds of instruments currently in use are discussed in Chapter 3. Because the selection of a specific instrument will depend upon local needs, we have tried to discuss only general principles involved in gathering information about human services. The procedures for gathering information that are discussed in this manual should therefore be generally applicable, regardless of the specific means used for gathering the information.

Storing information

The form of the resource file and the techniques associated with it will vary according to the methods that will be used to retrieve the information it contains. Several communities across the United States are now exploring the use of computers for storing information about human services. However, only a few of these efforts are investigating such

*Words printed in boldface are defined in the Glossary on page 68 of this manual.

methods as on-line retrieval and direct service. Although there have been many efforts at computerization geared for the publication of service directories, computers have yet to be used to provide I&R service.

There is an array of different "gadgets" for non-computerized, non-automated information storage systems – special file cabinets, illuminating devices, special cards, and so on. The system described in this manual does not require any equipment or cards that have to be special-ordered from a supplier. Also, the system is compatible with the eventual computerization of the resource file for on-line retrieval in the direct provision of I&R services. (The key to computerization, however, lies with the classification system of the **resource survey booklet**.) The emphasis in our discussion is on generality; regardless of the instrument used to gather information about human services, the storage system can be readily and conveniently adapted to handle it.

Retrieving information

The method of retrieving human resource information described in this manual follows many of the same steps that a computer would go through in retrieving such information. Depending on the quantity of data in the resource file, it may be necessary to consider alternative methods for retrieval (and possibly storage) in order to make the retrieval process more efficient.*

This manual was designed with two goals in mind: (1) instructions of sufficient detail to enable a single I&R center to organize a resource file on a non-automated basis; and (2) additional instructions to enable several centers to work together in a coordinated network. Procedures for coordination are given at critical points throughout the manual. These may be disregarded if the center is not planning to become part of a larger network of I&R centers.

The entire set of processes contained in this manual are schematically diagrammed in a flow chart on pages 107-115 in the Appendix. This flow chart provides a concise summary of the major steps necessary to build a resource file.

*A demonstration of a coordinated network of I&R centers using this system was begun in August 1972. [See Long, 1972, in the References on page 71 of this publication.] As experience is gained, some of the guidelines in this manuel will be changed; a final revision of this manual will be prepared after the conclusion of the demonstration.

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CHAPTER 1: Introduction

A good **resource file*** will go a long way toward making your I&R center an outstanding community asset. It will enable center personnel to serve requests for information quickly and correctly. A resource file can be especially important to centers that are staffed by non-professionals, volunteers, and part-time workers. A well-developed resource file allows these people to handle inquiries as effectively as if they were experienced and professional I&R workers. Most part-time non-professional and volunteer staff workers enter the scene only after the resource file has been prepared. If the file is a good one, then learning to use it and to handle inquiries comes naturally and very quickly. The proper resource file has three important qualities:

1. It is complete (it includes information on all community resources).
2. It is up-to-date (the entries are updated regularly).
3. It is well-organized (its categories and index help the user find what he is looking for quickly and without wasted effort).

Planning

A resource file that is complete, up-to-date, and easy to use will require careful planning. To do the job well will take time and patience. There will be a lot of paperwork, and you will have to visit many community **facilities** to obtain the information needed for the file.

How long will it take?

It will ordinarily take two persons working full-time (or their equivalent in part-time workers) three to six months to prepare a resource file for a moderate-sized community (100,000 to 500,000 persons). You and these workers will spend most of that time visiting and becoming familiar with the activities and personnel of larger community-service facilities. In between visits you will be kept busy processing the information you and your staff have collected and preparing the various parts of the resource file.

After the first three or four weeks you may find yourself growing impatient and anxious to get on with the business of serving the community. It may seem to you that

*Words printed in boldface are defined in the Glossary on page 68 of this manual.

you are already adequately familiar with your community and with what it has to offer. Nevertheless, it is very important that your plan for preparing a complete resource file be carried out for the full period of time budgeted for it. It makes no sense to skip a visit to an important community service and risk making an inappropriate referral because you are unaware of its value.

Keeping the resource file current

The job of maintaining the resource file is never finished. As you process inquiries, you will continue to learn new things about your community and its services; you must be prepared to capture this information and enter it in all the copies of the resource file. From time-to-time, you will find it useful to check back with facilities and update your resource file with new information. Later in this manual you will find procedures for keeping the resource file complete and up-to-date, but first read the following detailed discussion of how to prepare a new resource file from scratch.

CHAPTER 2: I&R Center Staff and Volunteers

Your I&R center may have only two or three paid staff members: the center manager, an I&R specialist, and a secretary; but there are many tasks and responsibilities for you and your staff to meet. One suggestion for division of labor could work like this: (1) The manager will oversee the day-to-day operations of the center; he or she will be responsible for the creation, maintenance, and updating of the resource file, and will complete periodic reports to the **network office**. The manager will also provide information and referral services to inquirers. (2) The information and referral specialist will also be thoroughly informed on the services provided by the community facilities. He or she will assume special responsibility for resources for special groups, such as the elderly. (3) The secretary will answer the telephone and refer inquiries either to the manager or to the I&R specialist. The secretary will also be responsible for many of the clerical tasks associated with the creation and maintenance of the resource file. A well qualified secretary may also handle many of the more routine initial inquiries received at the center.

It is possible that you will wish to organize responsibility for these tasks in a different way in your center. That is quite all right, since individual interests and experience should always be taken into account in assigning job responsibility.

Periodic consultation from the network office will be available through your **network coordinator**. The network office staff will always be available for emergency telephone consultation.

Recruiting volunteers

It is likely that there are several people in your community who would be interested in volunteering some of their time to the center. If you plan to serve a medium or large-size community, you may find it useful and even necessary to seek help in carrying out the initial facility interview program. Consider contacting volunteer service organizations -- for instance, the Association for the Advancement of Retired Persons, the Retired Senior Volunteer Program, the Junior League, or the League of Women Voters. Colleges or universities in your community will often have service clubs

or fraternities willing to lend a hand, especially if the work offered to them is interesting. Sometimes students may be granted course-work credits for such volunteer work.

As is always the case with volunteers, you must balance the assistance they provide against the time and effort of training them. Because your volunteers may be interviewing facility directors and representing the I&R center to other facilities, you will have to spend a good deal of time training them and planning and coordinating their work. In deciding to use volunteers, two factors should be considered:

- *The competence of your volunteers:* How much time will you have to devote to training your volunteers before you are assured of their competence?
- *The number of hours offered by each volunteer:* Volunteers who are available only a few hours each week may be valuable in manning the center or helping with some of the clerical work, but the effort to train them to administer the resource survey booklet may not pay off. For the latter purpose, your best volunteers will be those who can work intensively for several weeks.

Volunteers who are involved in preparing the resource file and setting up the center are likely to consider staying on to help operate the center. If you are planning to recruit volunteers to run the center, consider recruiting them in time for them to help develop the resource file. Regardless of the direct benefit of volunteer help to the center, there is also the intangible benefit of the relationships the volunteers make with the members of your community on behalf of your I&R center. Volunteer help is the first important step your center may take toward publicizing its services.

Training volunteers to interview facility directors

Your volunteers may not have much interviewing experience, especially experience in interviewing the administrators of organizations; and it is improbable that they will know much about I&R centers. It is essential that they receive training before undertaking any interviewing on their own. In preparing your training program, help from local consultants or your network coordinator may be useful.* The following points should be considered for such a program:

Step 1: Plan at least two sessions of at least three or four hours each. Spend some time describing the I&R concept and your plans for the center. Describe the resource survey

*Many communities have Voluntary Action Centers or Volunteer Bureaus that may be able to provide valuable assistance to you in the entire area of recruiting, training, and supervising volunteers.

booklet and how it is to be filled out. Then spend two to three hours practicing interviews. First, discuss the purpose of every question on the survey and consider the many possible replies and how to handle each. Then "role-play," that is, use pairs of people to act out interview situations. After each role-play interview, discuss what went on and suggest improvements to better the interview. Ask the other volunteers to participate in this. Role-playing is an excellent tool for this purpose. It is best to assemble all your volunteers for one day for the training sessions. The cost in your own time is drastically reduced.*

Step 2: After formal training, ask each volunteer to accompany you to one interview with a facility director. The volunteer should not participate, only observe.

Step 3: Finally, accompany each volunteer to his first interview. Observe his style and delivery, but do not interrupt. After the interview, discuss the experience. If you are convinced that this volunteer can do an adequate job, let him go to work. If you feel that some additional guidance is required, repeat steps 2 and 3.

Step 4: It may be wise to give additional training to one or two of your more outstanding volunteers so that they can help train and supervise additional volunteers. This will lighten considerably the burden of direct training and supervision by you and your limited number of paid staff members.

Remember to use your own good judgment in working with people whom you recruit for interviewers. Be sensitive to their need for a word of praise for a job well done or for the time that they have given you. A personal note of thanks is always appreciated. Special certificates of appreciation can also be used with good effect (see page 84 in the Appendix). Your sincere recognition of their efforts will have additional pay-offs in the later operation of the center, especially if some of the volunteers decide to stay on. The likelihood that some will volunteer to stay depends, of course, on their enthusiasm for the center's program. But it depends just as much on their feelings towards you. Have you made yourself the kind of person they would like to continue working for? Have you made the I&R center the kind of place where volunteers would enjoy working?

*Depending on many factors, you may find that more or less time is needed to train volunteers to work for your center. These hours should be taken only as a general estimate of the actual time needed.

CHAPTER 3: The Resource Survey Booklet

One major problem you will have in developing a resource file is deciding how to catalog information about human services. This problem has two aspects: First you must have a standardized method for gathering information from various facilities, each of which may have a relatively unique way of thinking about and describing the services that its staff provides. Second, you must organize the resource file to permit rapid and accurate retrieval of needed information.

At present, there is no common language among service providers that can be easily transferred to the system used in your resource file. In recent years, however, a number of people have become concerned with this problem and have made efforts to come up with methods for recording information about human services that will satisfy the storage and retrieval needs of an I&R service and also be acceptable to service providers as a way to describe what is done in the facility where they work. Some of these methods have been refinements of the approaches used in preparing directories of community resources; other methods have been attempts to use computers in solving the storage and retrieval problem.

Six approaches are examined in this section. Neither the approaches selected nor the detail in which they are examined is intended to be more than an overview. There are more than six ways to obtain information for a resource file, and much can be said about all of them. Our intent in this chapter is only to give you an introduction to the work being done on this problem. The particular resource survey that you choose to use in your information and referral center will depend on a number of factors, not the least of which is the funding available to develop and maintain the resource file. But you should not start planning your work until you know what others have found to be satisfactory methods to achieve their ends.

Questionnaire for Community Resources Survey

An example of a more detailed refinement of the usual community resource directory is reproduced on pages 74-83 in the Appendix under the title "Questionnaire for Community Resources Survey." This questionnaire was developed by InterStudy.* It consists of two primary sections. One deals

*Formerly the Institute for Interdisciplinary Studies.

with pertinent aspects of the facility's operation: hours open, eligibility requirements, accessibility of the facility, and the like. The other section is in the form of a checklist that is organized around nine basic service areas and one miscellaneous category. An overview of this organization is given below.

Overview of the Organization of Questionnaire for Community Resources Survey

I. *Financial*

II. *Housing*

III. *Health*

IV. *Home-helps*

V. *Legal*

VI. *Leisure-time activities*

VII. *Personal-social*

VIII. *Transportation*

IX. *Miscellaneous*
- (1) *Taxes*
- (2) *Emergencies*
- (3) *General information and referral service*

Comment An effort has been made in this questionnaire to avoid one of the pitfalls to be found in many directories: a mixed classification system in which services, professionals, and problems are indiscriminately used in an alphabetical listing of community resources. Although the questionnaire is organized around major service categories only, a major category may also be subsumed under other major categories. For example, there is a major section dealing with "Financial" services (Section 1), but one also finds financial services for specific areas repeated under other major headings (e.g., III-E-1: financial assistance as a "Supportive" service in the general area of "Health" service). This approach to classifying services requires double entries for a single service. If a double entry is not made, the retrieval of information about facilities that provide some services will be incomplete.

UWASIS The United Way of America Services Identification System (UWASIS) appeared early in 1972. The following paragraph, taken from the introduction to this system, describes it succinctly:

> *The United Way of America Services Identification System (UWASIS) describes programs within the framework of*

fundamental goals in the field of human services. UWASIS outlines: the basic social goals; the services systems which promote such goals; the specific services in such systems; the programs which perform such services; some elements of such programs; and suggested program products – in terms of types of persons served and efforts expended on their behalf. Thus, UWASIS identifies six basic goals, 22 services systems, 57 services, and 171 programs. Included in UWASIS are most of the organized, identifiable and currently operative endeavors – governmental and voluntary – which are addressed to preventing, ameliorating or solving human problems and to enhancing the human condition. [United Way of America, 1972, page 1.]

The general organization of UWASIS can be seen from the excerpt from its table of contents presented below.

Organizational Basis for UWASIS*

Goal 1 Adequate income and economic opportunity

A *Employment services system*

1 *Manpower development and training services*

a *Job finding*

b *Pre-job guidance*

c *Job training*

d *Job placement and referral*

e *AIN*

2 *Special employment services for the socially, economically, and politically disadvantaged*

a *Employment assistance to the socially and economically disadvantaged*

b *Bonding of ex-offenders*

c *Exemplary rehabilitation certification assistance*

d *Certification for employment of non-citizens*

e *AIN*

3 *Special employment services for the aging and the physically and mentally handicapped*

a *Sheltered remunerative employment*

b *Homebound employment*

c *AIN*

B *Income maintenance services system*

1 *Social insurance services*

a *Health insurance for the aged – hospital insurance (Medicare)*

Comment Close examination of UWASIS reveals a mixed classification system. For example, "Job finding" and "Job training" (*I-A-1-a* and *I-A-1-c*) are both general categories of

*United Way of America, 1972, page 7.

service, rather than actual services. "Bonding of ex-offenders" (1-A-2-b), on the other hand, is a specific service: the term mixes a category of service with a client group and an implicit eligibility restriction. "Bonding," unqualified, would refer to a general category of services that very well might be needed by persons other than "ex-offenders"; in all of UWASIS, however, "bonding" is mentioned only in the one context.

In the introduction to UWASIS, the authors note that this version of UWASIS is only a beginning, and state, " . . . United Way of America fully recognizes that additions, corrections and refinements will be necessary as UWASIS is actually put to practical use" [Page 1]. At this time, a formal resource survey booklet based on UWASIS has not been made available to the public.

Agency Survey

The "Agency Survey" was developed as part of the "Improved Coordination of Human Services" study, a project undertaken by InterStudy [Dobmeyer, *et al.*, 1972, six volumes]. A significant part of this project was the development of an information and referral service system, which was put into operation in the Model City area of Duluth, Minnesota, on an experimental basis. Two related instruments were developed for this system: a "Problem/Service Taxonomy" and an "Agency Survey."

In discussing the taxonomy in a summary report, the authors state that:

> *Its purpose is to define terms and develop a formal classification system for relating services to specific program objectives within each of several client problem areas.*
>
> *The taxonomy identifies major program objective categories and services necessary to accomplish these objectives.* [Dobmeyer, *et al.*, 1972, volume 1, page 17.]

A more detailed analysis of the taxonomy describes it as a "hierarchy of six basic problem areas, 18 program objectives, and several hundred services" [Dobmeyer, *et al.*, 1972, volume 5, page 4]. The program objectives used in this taxonomy are summarized on page 10 of this manual. The following excerpt gives a clearer picture of the structure of the taxonomy:

> *A seven-digit numbering scheme* [is used] *to identify any particular service in the taxonomic structure. The first two digits identify the program objective under which the service is found. The remaining five digits are used to indicate the service in a three-tiered structure within the program objective; the third and fourth digits indicate the first-level services; the fifth and sixth digits indicate the second-level services; and the final digit indicates the third-level services.*
>
> *For a simple program objective (e.g., insure that a person obtains food), only the first of the three levels will be used. A more complex program objective (e.g., insure that a person increases his level of education or improves his occupational skills), may require*

Summary of taxonomy problem areas and program objectives*

Health	1.	*Insure that a person is able to improve his health or physical functioning.*
Employment	2.	*Insure that a person obtains or maintains employment.*
Education	3.	*Insure that a person increases his level of education or improves his occupational skills.*
Basic needs	4.	*Insure that a person obtains food.*
	5.	*Insure that a person obtains clothing.*
	6.	*Insure that a person obtains financial benefits or aid to which he is entitled and/or provide benefits to him.*
	7.	*Insure that a person obtains a temporary place to live.*
	8.	*Insure that a person can move to better housing.*
	9.	*Insure that a person is able to make his present home more liveable.*
	10.	*Insure that a person improves his means of transportation.*
	11.	*Insure that a person makes the best use of his financial resources.*
	12.	*Insure that a person can obtain supervised or residential care.*
Personal services	13.	*Insure that a pregnant woman and/or prospective adoptive parent receives needed services.*
	14.	*Insure that a person resolves legal matters.*
	15.	*Insure that a person makes satisfying use of leisure time.*
	16.	*Insure that a person obtains a day care or child care program for his or her child and/or monitor the delivery of day care or child care services.*
	17.	*Insure that a person obtains assistance in improving personal and social functioning (i.e., improving a person's ability to cope with or solve personal problems).*
Advocacy	18.	*Insure that residents receive services for which they are eligible and insure that agencies are responsive to the needs of clients.*

*Dobmeyer, *et al.*, 1972, volume 5, pages B-6 through B-9.

Sample checklist from Agency Survey*

PROBLEM AREA - BASIC NEEDS

Program Objective (6): Insure that a person obtains financial benefits or aid to which he is entitled and/or provide benefits to him.

Explanation: The purpose of this program objective is to help a person obtain benefits or directly provide him with them. Clients are usually called recipients, beneficiaries, or claimants. Staff providing services are usually interviewers, social workers, or eligibility technicians and determination specialists. Major agencies are Social Security, Welfare, Workmen's Compensation (Industrial Commission).

Typical Services:

	Check those that apply		
Benefit Program	1*	2	3
.1 General relief or maintenance relief			
.2 Old Age Assistance (OAA)			
.3 Aid to the Blind (AB)			
.4 Aid to the Permanently and Totally Disabled (APTD)			
.5 Aid to Families with Dependent Children (AFDC)			
.6 Medical assistance payments			
.7 Food Stamp program			
.8 Workmen's Compensation			
.9 Unemployment Compensation			
.10 Old Age, Survivor and Disability Insurance (OASDI or "Social Security") a. Retired workers, their spouses, their children b. Disabled workers, their spouses, their children, their widows or widowers, their parents			
.11 Veterans' pensions, also for their widows and dependent children			
.12 Railroad retirement (note: this is a federal program)			
.13 Other private pension/retirement plans, specify			
.14 Strike benefits			
.15 Serviceman's dependent allotments			
.16 Court order (e.g., child support, alimony)			
.17 Trust fund and guardianship payments			
.18 Tax refunds			

*1. Determine if the person is eligible for benefits.
2. Assist the person in obtaining beneifts (fill out forms, advocacy, etc.).
3. Disbursement of money.

*Dobmeyer, *et al.*, 1972, volume 5, page A-8.

*two levels to define the services, while several program objectives may require all three levels to define the services and their inter-relationships. Where second and third levels are used, it is to give further specification as to service content. For instance under Program Objective 1 ("Insure that a person is able to improve his health or physical functioning") the first-level service, "Rehabilitation services and therapy," is divided into two second-level services, "Evaluation" and "Therapy." The latter service is, in turn, divided into third-level services. This structure is summarized below:**

Seven-digit numbering scheme used in problem/service taxonomy

number	service name	service level
01 05 00 0	*Rehabilitation services and therapy*	*1*
01 05 01 0	*Evaluation*	*2*
01 05 02 0	*Therapy*	*2*
01 05 02 1	*Physical*	*3*
01 05 02 2	*Occupational*	*3*
01 05 02 3	*Speech*	*3*
01 05 02 4	*Recreation*	*3*
01 05 02 5	*Respiratory disease*	*3*

An example from the service list ("Problem Area – Basic Needs") used in the Agency Survey to show the implementation of this taxonomy is reproduced on the preceding page. The Agency Survey consists of a fifty-page manual and a twenty-page recording form. The manual is used as a schedule to interview agency directors; their responses are written down on the recording form. The information contained on the recording form is transferred to other summary forms for storage in the resource file. The first forty pages of the manual consist of check lists such as that reproduced on page 11. The remaining pages contain questions about the agency's budget, case-load, and coordination with other agencies. The data from these pages are to be used for planning by the I&R center.

Comment

This classification system was designed to help the I&R center to provide information and make referrals on the basis of "outcomes." That is, an effort has been made to gather information about services in such a way that program objectives or outcomes are clearly identified by service providers. The interviewing process at the I&R center is oriented toward helping a caller state his need in such a way that specific desired outcomes can be formulated. Information is then given and referral is made on the basis of services that agencies or programs provide in order to achieve those outcomes.

*Dobmeyer, *et al.*, 1972, volume 5, pages 4-5.

SEARCH: Inventory of Health Services

The SEARCH system was developed for cataloging human services in Los Angeles County. In Los Angeles, Project SEARCH employs a totally computerized system for data retrieval, using a network of on-line computer terminals located in a variety of host facilities. Wisconsin Information Service* is using the SEARCH system to develop the resource files of a network of semi-autonomous I&R centers located throughout most of the state of Wisconsin; all of these centers employ manual data-retrieval systems.

The SEARCH Inventory booklet is composed of three sections: *Section A*, which contains questions about the identification of facilities, such as ownership, funding, and the specific person and phone number to be used in making contact; *Section B*, which consists of a series of matrices listing problems and services in twenty-two major service areas; and *Section C*, which contains questions about the availability and accessibility of service – including, for example, hours of operation, fees and charges, and limitations or restrictions on service.

The SEARCH Inventory categorizes services in relation to problems that the service is to solve; it does this primarily by means of a matrix format. Twenty-two broad service categories are presented in the booklet, and in nineteen of them a matrix is formed by listing problems alphabetically down the left side of the page (or several pages in some cases). Each problem statement is unique in the SEARCH Inventory; that is, it appears only once in the entire booklet. Services that may be available to solve or cope with problems are listed alphabetically across the top of the page. Because a single service may relate to more than one problem, service statements may appear more than once throughout the booklet. The categories of services contained in the SEARCH system are listed below.

List of service categories from SEARCH†

01	*Clothing*	12	*Housing*
02	*Consumer protection*	13	*Insurance*
03	*Disasters*	14	*Law enforcement*
04	*Education*	15	*Legal*
05	*Employment*	16	*Life and death emergencies*
06	*Environmental health*	17	*Medical*
07	*Family*	18	*Recreation*
08	*Financial*	19	*Transportation*
09	*Food*	20	*Veterinary*
10	*Government*	21	*Volunteerism*
11	*Household essentials*	22	*Well person*

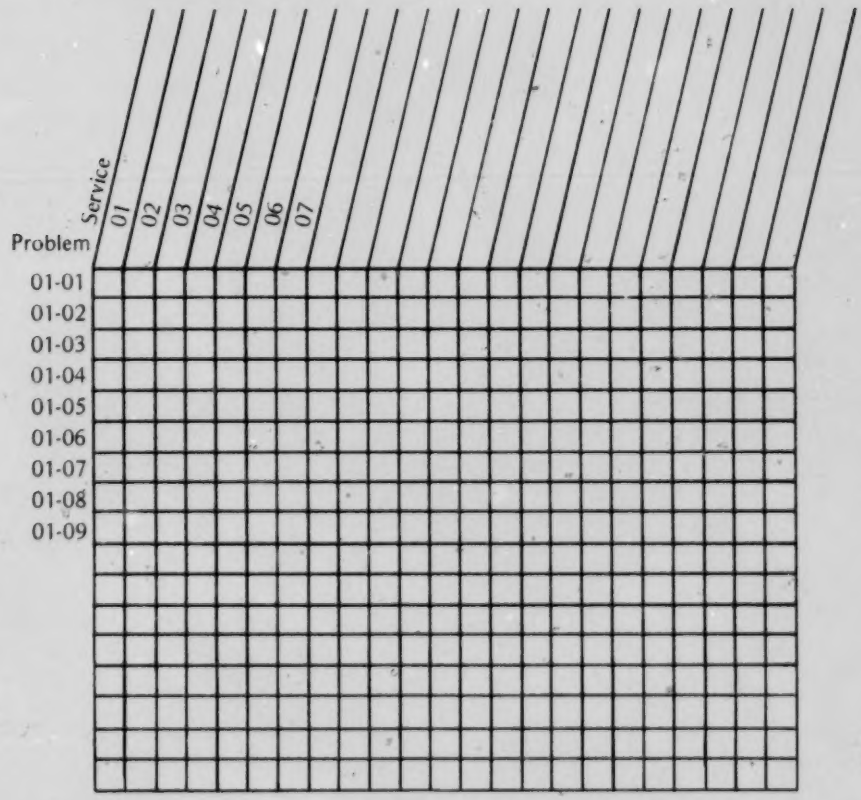
*Division on Aging Information and Referral project, 55 North Dickinson, Room 166, Madison, Wisconsin 53703.

†Caulfman, *et al.*, 1972, page 3.

Sample problem and service statements from SEARCH*

Problem list	Service list
Baby clothing	*Clothing, emergency*
Coats/jackets, child's	*Financial assistance*
Coats/jackets, man's	*Instruction, sewing*
Coats/jackets, woman's	*Layettes*
Everyday, child's	*Shoe orders*
Everyday, man's	*Shoe repairs*
Everyday, woman's	*Yardage*
Shoes, adult's	
Shoes, child's	
Sport outfits, boy's	
Sport outfits, girl's	
Uniforms (work clothing), man's	
Uniforms (work clothing), woman's	

Matrix format for SEARCH



*Cauffman, *et al.*, page 5.

A sample of problem statements and service statements from the service category "Clothing" is shown on the opposite page; the matrix format for integrating these statements is shown below it on the same page. In addition to the specific problems and services printed in the SEARCH booklet, each matric contains blank space for inserting additional problems or services that may be dealt with or provided by a facility and that are not stated in the printed format.

Administering the SEARCH Inventory, particularly to a large multi-service facility such as a county department of social services, is a time-consuming process. When completed, however, the data obtained concerning the services rendered by that facility are comprehensive and definitive.

Comment

The unique feature of this approach to classifying human services is its effort to relate problems and services to each other in a relatively simple language that would enable a potential service consumer to participate actively in determining his problem and choosing the services he would like to have in order to solve that problem. A **key word index*** has been developed for this inventory to enable its users to locate specific problem statements or services quickly and easily.

Project IRMA†

The *Information and Referral Manual* (IRMA) has been developed by the New York City Mayor's Office of Administration to provide information on governmental and voluntary facilities offering human services to New York City residents. The IRMA manual has been planned for use with a computer-storage system. Each facility is described by its location, telephone number, hours and seasons, sub-units, major agency affiliation, services, and service components. This method of coding facilities makes it possible to retrieve information by separate elements or by combinations of elements; also it avoids duplication, allows the application of only selected attributes to each service, and leaves the way open for controlled expansion of the data base.

The major channel for identifying facilities is by services. The 15 major service subject areas are listed on page 16; among these there are 47 sub-service subject areas and 25 third-level service subject areas, some of which are listed on the same page. These are general categories of service. In order to qualify them further, two sets of modifiers are used. One refers to a service in terms of the client group toward whom the service is directed: physically handicapped, aged, veterans, etc. The other modifier set refers to each service in terms of what is done in that service area: training,

*See InterStudy, 1972.

†This section was prepared by Rae Brooks, Director, Project IRMA.

Major service subject areas for IRMA

01/00/00 *Animal care*
02/00/00 *Business affairs*
03/00/00 *Consumer affairs*
04/00/00 *General educational programs*
05/00/00 *General employment services*
06/00/00 *Environmental affairs*
07/00/00 *General family substitute services*
08/00/00 *General health programs*
09/00/00 *General housing programs*
10/00/00 *General information and referral center*
11/00/00 *Law-related programs*
12/00/00 *Public services*
13/00/00 *Recreation and cultural affairs*
14/00/00 *Supportive services to families and individuals*
15/00/00 *Transportation and travel-related services*

Example of sub-service subject areas from IRMA

08/00/00 *General health programs*
08/01/00 *Nursing and home care*
08/01/01 *Nursing and convalescent homes*
08/01/02 *Homemaker services*
08/01/03 *Home nursing*
08/02/00 *Medical services*
08/02/01 *Outpatient medical services*
08/02/02 *Chronic diseases medical services*
08/03/00 *Rehabilitation services*
08/03/01 *Rehabilitation treatment*
08/03/02 *Sheltered workshops*
08/03/03 *After-care programs*

Service modifiers for IRMA

A *Coordination and planning*
B *Information and referral*
C *Technical/funding assistance*
D *Research*
E *Counseling*
F *Licensing*
G *Training*
H *Children*
I *Youth*
J *Adult*
K *Older person*
L *Physical disability*
M *Mental disability*
N *Drug abuse*
O *Alcohol abuse*
P *Disadvantaged*
Q *Veteran*
R *Offender*
S *Transient*
T *Student*
U *Unwed parent*
V *Family*

coordinating and planning, I&R, and so on. The list is presented on the bottom of the opposite page. Any number of services up to 20 (a constraint imposed by the computer system being used) may be appended to a facility. Any number of modifiers may be appended to a service subject. For example, suppose one wished to find a health facility that provides rehabilitative services for drug abusers and their families and that also has an information and referral service. "Health" and "rehabilitation" are represented by a two-level service code (*08/02/00*); this code would be followed by the pertinent modifiers: drug abuser (*N*), family (*V*), and information and referral (*B*). Such a service classification may stand alone or may be modified individually. Modifiers, however, may not appear unless appended to a subject.

Comment

This system has the advantage of allowing clear distinctions to be made between a service area, its type, and the client it serves. IRMA has the capability of retrieving on the basis of many different combinations of services and modifiers. It can be used to make logical chapter definitions for directories of community services. Finally, it allows many levels of linkage among services and allows for the logical addition of new components.

NEXUS*

The Network Exchange of Urban Services (NEXUS) system is a mixed approach to the classification of human services. It is based on the assumption that referral counselors will reduce client problems into their component parts and translate these into specific service needs. The classification scheme is built out of the working vocabulary of the social services. It is an interim solution that will only be valuable until a controlled classification and indexing vocabulary is established.

NEXUS is an outgrowth of the Philadelphia Model Cities Community Information Center. It was planned as a social-service information utility serving five counties surrounding and incorporating the city of Philadelphia.

NEXUS makes four information products available on a subscription basis to governmental, voluntary, and private agencies. One of these is the Automated Information Directory Service (AIDS). AIDS combines microfilm and computer technologies to produce an inexpensive, comprehensive, current file of resources in the human services that referral counselors can use at their desks.

The AIDS system stores agency index data on-line in a mini-computer. Detailed agency descriptions, complete with photographs of the facilities and maps showing the best public transportation routes to their offices are

*This section was prepared by Thomas Deahl of the Philadelphia Model Cities Community Information Center.

"micropublished" on microfiche every four months.

An AIDS installation consists of five items: a microfiche viewer, a microfile, a "Q" (query) pad, a touch-tone telephone, and an AIDS code book. The AIDS code book contains a listing of all agencies in the file, arranged alphabetically by agency title; the same list arranged in numerical order by a four-digit agency code; and a subject/service index (presented below), which classifies specific services under twenty-one general categories of service.

Major service categories for NEXUS

1. *Education*
2. *Employment*
3. *Financial subvention*
4. *Insurance*
5. *Consumer protection*
6. *Housing*
7. *Household essentials*
8. *Clothing*
9. *Food*
10. *Transportation*
11. *Family and personal supports*
12. *Crisis intervention*
13. *Mental health*
14. *Mental retardation*
15. *Physical health*
16. *Environmental health*
17. *Public protection, justice, and safety*
18. *Government*
19. *Mobilization of people and services*
20. *Recreation and cultural arts*
21. *Veterinary services*

Each major service category is subdivided into one or more of the problem/service areas listed below. Specific service provisions are listed under each problem/service division and assigned a unique four-digit code (see top of page 19). It is this numeric code that is used to gain access to the relevant data stored in the AIDS computer.

Problem/service subdivisions for the NEXUS category "Housing"

Abandoned
Discrimination
Disputes, landlord/tenant
Emergency housing
Foster housing (see family and personal supports)
Homemaker services (see family and personal supports)
Inadequate/hazardous living conditions
Maternity housing (see family and personal supports)
Nursing home care
Property inspection
Property, purchase
Property, rental
Relocation
Senior citizens
Veterans

Four-digit codes for specific services under the NEXUS problem/service area "Housing, Relocation"

Urban renewal aid	6372
Moving, financial aid	1194
Moving, household furnishings	0725
Renovation, technical aid	3343
Renovation, financial aid	4237

To identify all agencies that will provide a specific service or set of services, the AIDS subscriber dials the AIDS computer through his telephone and "touches-in" a string of codes representing a client's service needs and the relevant service discriminators (eligibility requirements), such as age, sex, income level, and residential address (as represented by the client's zip code). For example, the code that is punched might be:

*6372*0725#1194*#19132*0*

The computer translates this "complex search query" as:

> *Find all agencies that provide urban renewal aid (AND) household furnishings moving service (OR) financial aid to cover moving costs for a client that lives in zip code area 19132.*

The computer searches its file of some 3,000 service organizations and, in seconds, reports the agencies that match the criteria in this search statement. Agency references are reported in the form of four digit agency codes announced by a computer-activated tape on which a voice pronounces four numbers following the word "agency." The order in which the agencies read out to the referral counselor are ranked according to their geographic proximity to the client. The referral counselor jots down the numbers on his "Q" pad and then retrieves the agency descriptions from the microfiles that correspond to the agency codes. Referral recommendations can then be based on a first-hand review of agency service capabilities.

Comment

NEXUS, although an automated directory system, is severely handicapped by its subjectively derived classification scheme. The selection of terms used and their interrelationships are based on local conditions and preferences. This limitation is characteristic of all current efforts to develop classification schemes for human services.

Conclusions

The terminology of social welfare can be characterized as a "soft" vocabulary; that is, the terms are vague, ambiguous, and overlapping. Practitioners use the same words but mean different things by them or use different words to designate the same thing. It is very difficult to automate information

systems in a field with a soft vocabulary. To the extent that a classification and indexing vocabulary is soft and uncontrolled, machine-aided file searches will yield a large number of irrelevant – and thus useless – agency references. Until a comprehensive and controlled human-service vocabulary is established, machine-aided file-search systems will remain inefficient and unadoptable on a national scale.

The problems of making such a language, however, may always preclude an efficient national system. Not only is language a dynamic rather than a static system, but human needs change continually in relation to society – and therefore the language that describes them will always be changing. It follows that a comprehensive and controlled national vocabulary of human services may be no more of an aid to machine-aided data-retrieval systems than the lack of one. Such is the nature of many of the problems that face the planners and the managers of information and referral services. We hope that this overview of a few of the attempts to find solutions will be of some assistance to future programs.

CHAPTER 4: Planning a Resource File

It is important that the resource file be planned well before you begin visiting community facilities. Proper planning will save you hours of wasted visits and paper work. Good planning will also reduce the occasional need to contact a facility a second time to obtain information that did not appear necessary during the initial visit. Each hour of careful planning will return a savings of many hours of unnecessary work, wasted effort, and painful embarrassment. Careful planning cannot be over-emphasized.

Selecting a resource survey

In Chapter 3 we discuss several approaches to cataloging human services. Undoubtedly, many more methods exist. The first step in building a resource file is to select a resource survey for cataloging human services facilities in your community. This survey must meet the individual needs of your I&R center; factors that should be considered include:

- *The availability of the survey:* Is it readily available? Has it been used elsewhere? With what results?
- *The cost of the survey:* What is the cost of buying or reproducing the survey booklet? How do these costs compare with costs necessary to develop a completely new survey?
- *Acceptance of the survey by service providers:* Does the survey speak a language that is acceptable to service providers? Is the survey easy to follow and understand?
- *Ease of administering the survey:* Can volunteers be easily trained to administer the survey? How much time will be required per interview? How much coding and transfer of information will be necessary once the interview is completed?
- *The ultimate usefulness of the survey:* Will the survey enable you to provide the kind of service you want? All classification systems are arbitrary to a certain degree. The success or failure of any classification system will be determined largely by how well it enables its users to achieve their goals: in this case, the accurate and efficient provision of information about human-service facilities.

Identifying community facilities

Once you have selected your resource survey, consider the problem of how to identify all the facilities, programs, organizations, and individuals that provide services in your community. Each one that is identified will be asked either to participate in an interview or, if arranging an interview proves to be difficult or impossible, to fill out the survey and return it by mail.

There are bound to be several persons in your community who are already familiar with many of the local resources. In many cases, lists of local resources may already be available. By all means, get in touch with several of these people and find out what is known and available. These lists, however, should be used to supplement and not substitute for the list you are developing. Your best contacts will be made at the county welfare department, the health and welfare planning council, and the chamber of commerce.

In addition to these sources of information, you should not overlook the information contained in your telephone directory. Turn to the "Government" heading in your yellow pages. There you will find listed the federal, state, county, and municipal agencies and departments in your area. Examples of source documents used for this purpose in the development of the Wisconsin Information Service are listed on the opposite page.

Transfer this information onto 3" x 5" **cross-reference file cards** (see page 85 in the Appendix) and alphabetize them according to facility name. This will prevent duplication; the yellow pages often list facilities in many places under different headings. You will want to contact a facility only once for the information you need while you are developing the resource file. Therefore, it is important that it not be listed more than once at this time. Some care must be taken, because some facilities may be known by more than one name. Other names ("also known as" or AKA) should be listed on the back of the cross-reference file card. Additional cross-reference file cards should be prepared for such names to include in the **cross-reference file** so you can easily find a facility known by several names.

If you are aware of facilities that are located outside of the area served by your center but that might still be of service to residents in your area, do not send surveys to them. Instead, contact your network coordinator. He or she will be able to coordinate the gathering of information on these facilities so that they will not receive duplicate requests from other participating I&R centers.

List of sources used in developing WIS center resource files

Documents

Association of commerce (areawide) resource lists
Chamber of commerce organization and resource lists
City and areawide directories of community services
City and village directories of clubs and organizations
City directories
Committee on aging resource lists
Community Action Program (CAP) resource file lists
County and city United Way (or United Fund) directories of services
County coordinating council directories
County directories of resources
County yearbooks
Directories of nursing homes, county homes, residential care facilities
Facility brochures
"Fish" (a volunteer organization) lists
"Hotline" resource manuals
Human rights commission directories of services
Lists of members of village and county boards and committees
Lists of resources available in state for alcoholism and for drug abuse
Meeting notices
Newspapers
Official directories of villages, cities and counties
Pamphlets from extension offices
Regional environmental directories
Senior citizens' guides to community facilities
State council for local history rosters
State department of natural resources directories
State department of social services directories of nursing homes, day care centers, and nursery schools
Telephone directories (city, village, county, etc.)
United Community Council (United Fund or Community Chest) directories of services for counties and cities
Women's club community brochures

Organizations and individuals

American Legion posts
City hall
Cooperative educational service agencies
County council
County courthouse
Head Start programs
Information gained from community persons (such as a former director of Senior Opportunities and Services)
Information gained during facility interviews
Phone contacts by volunteers
Public libraries

Obtaining information from facilities

The preferred method of obtaining information from facilities is, of course, the personal interview. Personal interviews invariably yield the best results: more and better information, closer familiarity with the facility, and an initial friendly and personal contact with facility workers. The personal interview also allows you an opportunity to inform some of the facility staff of your plans and to convince them of your sincerity and desire to cooperate without infringing on their own activities. A personal interview with a facility director in his or her own setting will give you an opportunity to make observations about the facility's special interests and services. (Information on how to conduct an interview is given in Chapter 5.)

The list of organization names you have collected will be the guide to the facilities you should contact for information. You will find, of course, that the list is a rather lengthy one. Although desirable, it may be impossible to arrange personal interviews with all the facilities on the list. In a few cases it may therefore be necessary to inquire for information by mail.

In order to plan your schedule for the next few weeks, you will have to determine which facilities on your list to visit first. Depending on how much time you have, you may have to ignore some, except for listing their names. Such a list will usually contain the names of the professional individuals in your community — doctors, lawyers, pharmacists, dentists, and others — for it will be impossible to contact each and every one of them. Occasionally, however, you will hear of individuals who specialize in working with the elderly or other special groups. You may want to contact these specialists, probably by telephone. However, your best procedure is to work with the local professional associations, such as the medical society and the bar association. (See Chapter 6 for a discussion of contacting private practitioners.)

Rank your list of community resources, putting those judged most important at the beginning of the list. The following kinds of facilities should appear near the beginning of the list:

Government agencies

Welfare department
Social Security agency
Health department
Veterans' Administration
Hospitals and mental health centers (includes private)
Clinics (includes private)
Police department
Park or recreation department
State employment agency

Public housing authority
Housing facilities for the elderly

Private organizations

Community centers, senior centers, churches
Local medical, dental, nursing, social worker, pharmaceutical, legal, and ministerial or clerical associations
Voluntary agencies and groups
Legal aid society
Community emergency or rescue organization
Retirement organizations
Public transportation companies
Handicab companies
Service clubs
Hot Lines

In the next chapter are descriptions of how to arrange and conduct personal interviews with the facilities on your list and how, if it proves necessary, to contact facilities by mail.

CHAPTER 5: Gathering Information about Facilities

You can use your resource survey booklet to obtain information either by mail or by personal interview. As previously discussed, by far the most effective method is the personal interview; most of this chapter, therefore, has been written to concentrate on helping you make your interviews as profitable as possible for your I&R center. Of course, you may not be able to contact every facility in person. For this reason, the last two sections in this chapter provide tips on contacting facilities by mail.

What is an interview?

By and large, interviewing is really only a form of guided conversation between two people. The conversation is *guided* in that one person usually asks a set of planned questions, while the other supplies the answers. But all successful interviews are really two-way conversations: both participants talk and both listen, one to the other. During the course of this social and usually quite congenial conversation, the necessary information is shared between the participants.

Interviewing is, therefore, no more difficult than holding a polite conversation with a casual acquaintance. The success of your interview will depend, of course, on what you say and how you say it. But it will depend just as much on what you display at the interview in the way of your sincerity, interest in your center, and interest in the director's own facility. This will be conveyed by the way you participate: the way you ask questions, the way you listen, and the way you answer questions.

Arranging an interview

It is best to send a letter of introduction to a facility before telephoning to arrange for an appointment. A format for this introductory letter is reproduced on page 94 in the Appendix. Enclose with the letter whatever publicity releases are available. Your network coordinator will make available to each center publicity releases pertaining to the operation of the I&R network as a whole. In addition, you can make copies of articles appearing in local newspapers about your I&R center and include them with your letter of introduction. Also enclose a copy of an informational **brochure** that has been written especially for facility directors (see page 102 in the Appendix).

It is important that you check your cross-reference file before sending out the first letter of introduction. It may happen that one individual directs more than one program or facility. It may also happen that several programs are housed in the same physical setting. In either case, you will wish to avoid the embarrassment of sending several copies of the same form letter. Perhaps the easiest way to do this is to go through the entire file and group cross-reference cards by zip code, then street, then address. In most cases you will not know the name of individual facility directors at this early stage, but identical addresses may give you a clue to do some further checking before you actually begin to mail out your introductory letters. A phone call to the facility may be the quickest and easiest way to discover duplications in your cross-reference file.

Furthermore, it is important to contact key individuals in a multi-service organization first. For example, a city government may have several separate programs that you wish to contact and interview. Contacting the mayor first is likely to make contacts with other programs go more smoothly. It could be very embarrassing to have such a key person tell you that he heard of your center through one of his subordinates whom you contacted earlier in the week.

Phone call

Your best personal contact at each facility will probably be the director. First, telephone the director's office and inform his secretary that you are calling on behalf of the information and referral center or network, which will soon be opening an information and referral center in your community and which is developing a resource file to be used by that center. At this point you will probably be connected with the director, if he is available. If he is not available, the secretary will ask for your name and telephone number so that he can return your call. (If this does not happen, be sure to suggest it yourself, so that you do not have to make unnecessary return phone calls.)

When you do talk to the director, introduce yourself by your name and title. Remind the director that you have already sent him a letter of introduction together with publicity releases and a brochure about the I&R center. If the director asks you what an information and referral center is, be prepared to give a knowledgeable reply by stating that it is a place where people can call for information about services that affect them most directly.

Then explain what you mean, saying that people sometimes do not know where to go to obtain the services they need, and that they very often do not even know about all the services available to them. Then add that the purpose

of an information and referral center is to link people and services together. Explain that your center will serve the general community, or a specific sub-population such as the aged.

Be sure to return to the reason for your call, which is to make an appointment for an interview. It is a good idea to give the director an accurate idea of the time required to complete the survey so that you will not have to make another appointment to finish the task. Once a definite time and date have been set for the interview, it would be wise to offer to send the director a copy of the survey booklet to review before your appointment. This will make the interview easier.

In many cases, a busy facility director may ask that you meet with a key member of his staff. Such a meeting will usually be quite satisfactory.

Be sure also to leave your telephone number with the director's office so that you can be quickly contacted if the appointment must be changed.

Be certain to keep a calendar of appointments and a record of all facilities that have been contacted and by whom. This can be done on the cross-reference file cards. You should include:

(1) the date of the first telephone contact,
(2) the date of the interview and the completion of the survey,
(3) the name of the person who conducted the interview,
(4) the dates on which verification approval was requested and received, and
(5) the number assigned to the facility (see page 42).

See also "A suggestion" on the opposite page.

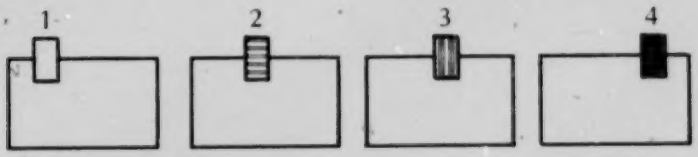
Confirming letter

After your phone call to set up an interview, it is important also that you confirm your appointment with the director in writing. Writing the director a letter assures that both of you agree on the meeting date and that neither of you has made an error about the appointment time. The letter will also give you an opportunity to send the director a copy of the survey booklet, if you wish to send it out prior to the interview.* A model letter for confirming your appointment with the facility director may be found on page 95 in the Appendix.

*Personal experience and judgment are the best guide for determining whether or not to send out the survey booklet prior to the interview. In some cases doing so may be a real time-saver; the facility director will be better prepared for the interview because he has had a chance to look over the survey and think about his responses. Other directors may be overwhelmed by the survey if it is very long or complex. Based on previous experience with some directors, you may be able to determine who should receive one prior to the interview and who should not.

A suggestion

The use of colored tabs in certain positions on the cross-reference cards will make it easy for you to see the progress you are making toward contacting and interviewing the facilities you have selected. Colored tabs are available from almost any stationery store. Divide each cross-reference card into four positions:



Each position has a different meaning:

- *A tab of one color placed in position 1 means that the facility has not yet been contacted.*
- *A tab of another color placed in position 2 means that an appointment for an interview has been made.*
- *A tab of a third color placed in position 3 means that a copy of the resource survey booklet has been mailed to the facility for either the director or a member of his staff to look at before the interview.*
- *A tab of a fourth color placed in position 4 means that the interview and the resource survey booklet have been completed.*

Each card will have only one tab on it at a time. The color of the tab and where the tab is placed on the card will depend upon which position accurately reflects the current status of the facility. Thus, by picking up a cross-reference card you can tell at a glance (from the position of the tab and from the color) how far along that facility is toward being included in the resource file.

A SUMMARY: Arranging an appointment with a facility director

1. *Send a letter of introduction, including brochures and other informational materials.*
2. *Telephone the director to arrange an appointment.*
3. *Send a letter that confirms your appointment; include the resource survey booklet when appropriate to do so.*
4. *Visit the director for the interview.*
5. *Send a thank-you letter.*

REMEMBER

- Confirm each appointment in writing.
- Leave your telephone number with the director.
- Keep a calendar of appointments and a record of contacts.

Number of daily appointments

Interviews will ordinarily take about two hours. But if you include the time required to record all the information you have obtained, traveling time to and from the interview, plus time lost due to unforeseen delays, each interview may take more of your time. You will discover soon enough how many interviews to schedule for any one day. The number will vary depending upon the size of the facilities, their distance from the center and each other, and the experience of the interviewer. Usually two or three interviews a day will be the maximum that you can reasonably expect to complete.

Even if you are prepared to conduct three interviews each day, you will very often find yourself with free time because you have not been able to schedule an interview for some particular time. On the average, however, you should expect to be doing two or three interviews a day – some ten to fifteen per week per interviewer.

The number of weeks you will have to spend interviewing facility directors depends, of course, on the number of interviews you can "pack" into every week of your schedule. The number of 3"x5" cards on which you have listed facilities gives the approximate number of facilities and service providers you have decided to contact. If there are more facilities to contact than you can conveniently handle, you should investigate the possibility of using volunteers to assist you.

Several points should be remembered to keep your interview schedule tightly packed:

1 *Interviews deserve priority over office work.* Arrange your office work around your interview schedule, not the reverse. Do your office work during the times you have not been able to arrange interviews.

2 *Arrange your interviews well in advance.* Arranging for interviews in advance means well in advance: two to three weeks in most cases. This will require planning. Every week you will have to list the facilities you wish to visit two or three weeks later, and arrange to have letters mailed to those agencies. You will also have to telephone them well in advance of each visit.

3 *Arrange interviews with many facilities, more or less at once.* Mail several letters at once, and follow up in a few days with phone calls to all facilities to which letters have been sent. With this approach you will always have some more phone calls to make and some more possibilities of filling in your own time schedule.

When you have arranged interviews with half of your most recent set of contacts, start on a second round of letters and phone calls. Don't hold off a second round of contacts while you are waiting for the final arrangements of the first

round of interviews. It may happen that some directors contacted in a subsequent round of contacts may be available immediately, thus you can fill in some empty slots from this next round.

Do not send more letters than you can follow up within a few days. If you get behind in your phone calls, you may create a bad impression. Your phone follow-up should come about three to seven days after the letter was sent. The exact number of letters that you should send will depend upon the size of your staff and by your own experience. At first you may try sending ten to twenty letters at a time; this will give you a feeling for how the process will work. Gradually you can increase the size of your mailings.

Keeping the appointment and being on time

Once you have made an appointment, keep it. If something unforeseen forces you to change it, be sure to call and inform the director that you will not be able to keep your appointment and would like to schedule another one. Similarly, if you find that you will be late, be sure to call ahead. Otherwise you may have to schedule a new appointment. Keeping your appointment and being on time convey courtesy and consideration for others and also indicate that you take your job as seriously as the agency director takes his. Always remember to bring along extra copies of the resource survey booklet in case the facility director has mislaid the copy you enclosed with your letter confirming the appointment.

When you arrive for the interview

When you arrive you will probably have to wait a few minutes in the reception area. You should not have to wait too long, but in the event of some slip-up on the director's part, it would be wise to inquire about how long the wait might be. If the director's schedule is too packed, you may find yourself sitting for a long period of time. If you have a later appointment at another facility, be sure that you are not risking the next appointment by delaying the present one. It may be wise to reschedule the first one and leave for the next one, rather than to have to wait at the first one and upset the next one as well. These things will happen from time to time; you should anticipate them and be ready to plan around them. If it is your last appointment for the morning or for the afternoon, on the other hand, waiting for fifteen minutes or even half an hour may be irritating, but it is much easier than rescheduling the appointment.

There is no single way to begin an interview, but most interviewers begin with the exchange of a few pleasantries and then proceed to the matter at hand. Since you will be on the director's home territory, he may begin by asking you

something about the information and referral center and about the resource survey. After this, you might ask him if he has had an opportunity to review the materials you have already sent him, and if he has any questions about them. This will give him an opportunity to indicate how much homework he has done before the interview. Some directors may have examined the materials thoroughly and planned their replies to your questions; others will have preferred to wait until the interview to do so. In only a few minutes you will be able to return to the main purpose of your visit: finding out about the facility.

The interview

Following the exchange of pleasantries at the beginning of the interview, you should turn to the survey booklet and ask the director to help you fill it out. If parts of the survey have already been completed, either by the I&R center or by the director, use the marked copy for the interview, obtaining information or explanations for items that were left blank. It will be best if you can arrange to sit beside the director, so that you work together on one copy. You should fill out the survey, offering the director a clean copy to read along with you. At the end of the interview, you should request that he return his copy to you.

It may be helpful for the director if you briefly describe the contents of the survey. Most items in your survey will be self-explanatory, but you should be able to answer any questions the director might have.

Sometimes particular services that a facility provides may not be readily found by the interviewer in the resource survey booklet. Rather than spending much time hunting through the survey for the service, it is often better to write it down in a "miscellaneous" or "other" category. In this way, the interview can proceed smoothly. Back at the office, a more careful search can be made to determine whether or not this is a "new" service not contained in the survey. (See page 48 for a further discussion of this matter.)

Once the survey has been completed and you have returned it to the I&R center, it is important that the information it contains be promptly transferred to a facility file form (see pages 87-90 in the Appendix). This process is described in detail in Chapter 7. It is a job that your secretary or volunteers can help to do.

Negative attitudes

You may occasionally meet a director who does not seem to be particularly happy about being interviewed. He may question the need for an I&R center in your community; he may not like the materials you have already sent him; he may resent or be suspicious of being interviewed by the

representative of another facility; he may wonder about your qualifications for the job you are doing.

To counteract such a negative attitude, it is very important for you to have come to the interview with its purposes clearly in mind. You may convey with authority the sense of knowing what you are doing and why you are there. You must also be prepared to accept the fact that an honest difference of opinion exists in some situations. This permits you and the person being interviewed to "agree," and eases tensions that sometimes develop over certain questions or terms that may be used in the survey booklet.

Ending the interview

When the survey has been completed, you have fulfilled the purpose of the interview. The interview has come to an end. Express your appreciation to the director for his time and cooperation and tell him that he will be mailed a summary copy of the survey (the facility file form) soon. Tell him that you would appreciate his taking time to review the form and to note any additions or corrections. Finally, tell him that there will be a verification form for him to sign and return to you. This form will indicate his approval of the contents of the facility file form and the accuracy of your description of his facility. To strengthen the rapport between his facility and your center you should firmly indicate at this point the importance of his approval.

When and how to mail resource survey booklets

On occasion, either because of your own time constraints or because of the preference (or refusal) of a director, you will be unable to administer the survey booklet personally. In either of these two cases, make arrangements to mail a copy of the survey booklet to either the director himself or to a specified member of his staff. Be sure to include an addressed, pre-stamped envelope for the facility to use in returning completed survey. A model letter to enclose with the survey booklet is reproduced on page 96 in the Appendix.

When making arrangements to mail out the survey booklet, stress the importance of the facility's completing it and returning it to you. Stress the fact that unless you receive the completed booklet, the I&R center will be unable to list that facility in its resource file. Tell the person that if he encounters any problems providing the information called for in the survey booklet to telephone the I&R center. In some instances it may be necessary to go over the survey page-by-page on the telephone.

Do not hesitate to call the facility back if, after two weeks, you haven't received the completed booklet. Again, offer assistance and remind the person of the importance of having his facility listed in the resource file.

Thank-you letters

A letter of thanks should be sent to every facility director who participated in an interview (see page 97 in the Appendix) or who completed and returned your mailed survey booklet (page 98). If you did not meet with the director, send a thank-you letter to the person who talked to you and a copy of that letter to the director.

You may also wish to telephone the director to thank him for his assistance. This option should be considered for any other persons who have gone out of their way to be especially helpful. When operating the center you will find the personal contacts that you have cultivated extremely valuable. It is worthwhile that you demonstrate and maintain your friendship.

Seasonal factors

It may be important to take into account seasonal factors when planning your resource file development. For example, during certain months in the summer, you may find many facility directors away on vacation. At other times of the year demand for services may be particularly heavy (e.g., in the fall at the beginning of the school year, or at the beginning of school vacation in the early summer). If you are planning to use volunteers, you should take into consideration university vacation schedules (such as at Christmas and Easter) or holiday times that require the volunteer to be attending to home and family.

CHAPTER 6: Contacting Private Practitioners

In most communities there are many private practitioners (physicians, dentists, lawyers, ministers, and others) who provide various health and social services to the general public. But to contact these individuals, even by mail, would be a time-consuming task that would delay opening your center to the public. The following activities will help integrate the community of individual professionals into your I&R program without requiring individual contacts with them.

Use of the telephone directory

Professional societies may be a great resource for your I&R center. Rather than contacting each practitioner (even by mail), visits with the heads of local chapters of professional societies will prove useful. Is there a county or city medical society, a bar association in your community? To find out, turn to the white pages of your telephone directory. Look up the name of the county in which your community is located. On that page, in capital letters, will be the name of the county. Following this heading is a listing of county departments and agencies (for example, Agriculture Agents, the Parks Department, and Traffic Department). Both before and after this listing of county departments and agencies are listed the names, addresses, and phone numbers of professional societies in your county (see page 36). The same process is used to locate professional societies in your city or community. Look up the name of your city or community in the white pages and look before and after the listing of city departments and agencies.

The yellow pages of your telephone directory is a second useful place to locate the names, addresses, and phone numbers of professional associations (see page 37). Although the headings may vary from area to area, a listing of professional associations usually may be found under one or more of these headings in the yellow pages:

Associations,
Professional Organizations, or
Social Service Organizations

If you have difficulty in locating professional societies in this manner, you might call Directory Assistance (Information) to ask under what headings professional associations are listed in your directory. Or you might call a

Dahl Geo R 1001 Vilas av 256-1175
Dahl Harold 3386 E Wash av 244-7970
Dahl Harold L 3714 Paus 244-5727
Dahl Harold P 5714 Dogwood pl 238-6366
Dahl Harvey O 409 W Broadway 222-0389
Dahl Helen Mrs 69 Redwing la 249-0845
Dahl Howard 104 N Breese ter 238-8055
Dahl Jerome L 1505 Lyndale rd 271-0065
Dahl John Construction Co Inc
6013 Winnequah rd 222-3632
Dahl John O 6013 Winnequah rd 222-3628
Dahl Kenneth E 2612 Arbor dr 233-0186
Dahl L J 21 Lansing 249-9460
Dahl Lawrence 4817 Woodburn dr 274-2876
Dahl Leslie H 1413 W Skyline dr 238-7022
Dahl Lon J 3033 Webb av 241-3571
Dahl Louis C 413 Grand av 233-4214
Dahl Lowell W 1723 Ongard rd 244-2811
Dahl Lynn 222 N Hamilton 251-4746
Dahl Margaret 2133 Fox av 256-3981
Dahl N 3209 Steuben 231-2156
Dahl Norman A 4405 Rolla la 233-1149
Dahl Paul M 626 Langdon 257-7731
Dahl Philip 4313 Maher av 222-8909
Dahl Rodney
4901 Chalet Gardens rd 271-9103
Dahl Ruben 540 W Gilman av 255-3913
Dahl Sanford 1321 Morrison 256-1389
Dahl Wilmer A 2406 Ashford la 271-3377
Dahlberg James E 718 Oneida pl 238-7954
Dahlby Rollin K 4404 Gordon av 222-6349
DAHLE also see DAHL DOLL
Dahle Andrew Mrs 410 Maywood 244-3197
Dahle Arthur S 1204 Wyldhaven av 222-4420
Dahle Beulah L Lamson 255-2562
Dahle Borshild 404 Algoma 244-3326
Dahle C M 5424 W Wash av 256-2541
Dahle Herman B 218 S Owen dr 233-4201
Dahle O B 1412 Morrison 255-9302
Dahle Sue 905 W Badger rd 251-0069
Dahlem Vern
2451 Commonwealth av 233-9615
Dahlem Vern Standard Service
2567 E Johnson 244-9828
DAHLEN ANDREW INC
855 E Johnson **255-1757**
If no answer call 873-3795
Dahlen Linda 516 W Main 257-5038
Dahler Glen E 125 Richland la 238-1230
Dahlk Darrell J 3015 Union 244-1781
Dahlk Debbie A
2319 Brentwood pkwy 244-4523
Dahlk Douglas B 1135 Pauline av 238-3788
Dahlk Gilbert E 3226 Thorp 244-6773
Dahlk John G 3210 Rudd 233-2350
DAHLK & MAY LANDSCAPING INC
Richard pl 41 Verona
Mailing Tel No **836-4021**
Dahlk Neiva 4102 Portland pkwy 244-0317
Dahlk Paul 425 Paunack pl 238-5304
Dahlk Rolland 122 E Dayton 256-4196
Dahlke Le Roy
3004 Hesterd rd Middle 231-2604
Dahlke Roger E 605 Blackhawk la 244-0993
Dahlman George J
4913 McKenna rd 222-3015
Dahlman Nancy 29 Gus Lee rd 251-0830
Dahlquist James 516 E Wash av 251-7361
DAHL'S CITGO SERVICE STATION
5201 Univ av **233-4677**
Dahlstrom Donald G 4321 Thorp 244-7395
Dahm Donald E 58 Cody av 238-3629
Dahm Mary S 3013 Ironwood dr 222-0203
Dahmen Clarence C
1209 Painted Post dr 222-0104
Dahmen H W 1009 S Brooks 256-5986
Dahmen Mary M
2050 Allen Blvd Middle 238-5726
Dahms J R 5414 Camden rd 222-4452
Dahnert Chas 3021 Worthington Av 244-3094
Dahnert Richard E
3317 Oakridge av 249-3295
Dahnert Vernon 3225 Quincy av 244-4381
Dahnke Freda 110 E Dean av 222-9282
DAILEY also see DALEY DALY
Dailey Clarence 5301 Maywood rd 222-4113
Dailey E G 706 S Baldwin 251-1887
Dailey James E 2001 Post rd 274-3468
Dailey John C Dr 2441 Fontaine cir 251-2470
Dailey Leroy E 853 Williamson 255-3932
Dailey Robt A 416 Paurack pl 233-4464
Dailey Thos E
5405 Century av Middle 238-7060
Dailey Warren M
331 Kensington dr 249-7901
Dailey Warren Lady Assoc
100 E Broadway 222-0900
Daily Cardinal 821 Univ av 262-5854
Daily Cord Record 115 W Doty 255-0036
Dainel A A 329 N Pinckney 251-2973

DAIRY CONFECTIONS OF MADISON
514 Division 249-6411
DAIRY EQUIPMENT CO DIV OF DEC INTERNATL INC
1919 S Stoughton rd **222-3484**
Plant Dept After 5:00 PM Call 222-3486
DAIRY QUEEN BRAZIER
714 Cottage Grove rd **221-2198**
Dairy Queen Store
2110 N Sherman av 244-0346
DAIRYLAND CHEMICAL PRODUCTS
4200 Sycamore av **244-4751**
Dairyland Fertilizers Inc
814 Lewellen Mazomanie 655-3421
Dairyland Grocery 421 State 257-9900
Dairyland Improvement Co
1622 Mayfield la 244-0728
Dairyland Insurance Co
625 N Segoe rd 238-5971
DAIRYLAND SIGNS-OUTDOOR ADVERTISING
2618 Eldorado dr **222-3166**
If no answer call 233-4241
Dais Harry G 2705 Chamber Inn av 213-1264
Daitch Etta 3428 Sunset dr 233-1885
Dake Philip J
2310 Chalet Gardens rd 271-2422
Dakan-Dakota Iron Co Rt Mazo 665-3403
Dakota Iron Co Rt Mazo 655-3403
Dalbec James 2827 Ashford la 271-7640
Dalbec Judy 3029 Webb av 241-1465
Dalberg Cyrus M 301 Rethke av 249-8715
Dalberg M 101 Femrite dr 221-2872
Dalberg Vernon 219 Memorial av 241-3572
Dalby Betty
76 Lakewood Garden la 241-0608
Dalby Keith R Cathy ct 271-1160
Dalby Thos M 374 S Park 256-4027
Dale Beron 1252 Sherman av 251-6295
Dale Carnegie Courses
1010 N Windsor av Oshkosh 414 377-2840
Dale Chas R insurance
110 E Main 257-2563
Res 729 Miami Pass 233-3872
Dale Elmer 1521 Adams 257-1863
Dale Fred B 1006 Birch Haven ct 222-8373
Dale Genevieve Mrs 111 W Wilson 256-2976
Dale Greg 1018 Vilas av 251-2701
Dale Heights Presbyterian Church
5508 Tonyawa 233-0134
Dale James 3503 Dutch Mill rd 222-1043
Dale Leona 1006 Birch Haven ct 222-8373
Dale Vera Mrs 4665 Devonshire dr 271-1690
Dalebroux Gary 2605 Arbury la 271-0122
Daleckl Kazimiera 1166 Petes dr 257-1283
Daleo M 735 W Main 255-4756
Dales Duane D 844 Maple ter 238-6625
D Alessio Dona J 1109 Gilbert rd 271-7773
DALEY also see DAILEY DALY
Daley Denise 139 S Hancock 256-0303
Daley Edward E 1629 Glenway 233-0139
Daley G W 1835 Monona dr 222-0377
Daley J 2429 Allied dr 271-9023
Daley James 3601 Spencer 244-5391
Daley John M 717 N Midvale Blvd 238-4807
Daley Knudt S Mrs 909 S Brooks 256-8900
Daley Lester James 2501 E Dayton 241-0473
Daley M 1309 Leopold Way 271-2912
Daley R B 133 N Franklin 255-0159
Daley Shirley 323 W Main 256-9610
Daley Ted 1019 Milton 256-1412
Daley Thos J 445 W Gilman 256-4772
Daley Thos W 1006 High 255-3694
Dalgish James 149 Iota ct 256-7983
Dalmaimer Kim 1821 Sherman av 244-7227
Dalned H E Jr Mrs 501 Hillcrest la 241-3122
Dalley Norman E 1218 Milton 251-5551
Dalman E J 2621 Van Hise av 233-3624
Dalman James H
4411 Military Ridge rd 238-4826
Dalman Mary 2021 Adams 255-7930
Dalman Mary 2668 Fremont av 241-1889
Dalman V Mrs 536 Arbutus 255-8307
Dalmasin Gary 5705 Lovell 271-6189
Daily Alfred D Dr also E W Gorham 255-9414
Res 2138 Rowley av 233-7941
If no answer call 255-9414
Childn 2138 Rowley av 233-4166
Dalrymple Dallas 1626 Madison 255-7379
Dalrymple Elmer J
5206 Flambeau rd 233-8481
Dalrymple Robt J
622 Manchester la 244-5139
Dalrymple Ron 1219 Miller 256-7539
Dal Sante John J 5917 Mayhill dr 271-4140
Dalson S Arvast R S Lampert 255-5502
Res 170 S Main Oregon 835-3454
Dalsoren Lloyd E 2525 E Mifflin 241-6169
Dalsoren Lowell 93 274-1646
Dalton Arthur D 3918 Tokay dr 244-3676
Dalton Bob J 1110 Tenney la 233-8055
Dalton Hazlin C 314 Debs rd 244-6518
Dalton J F Sr 606 Pine 257-6091
Dalton J W 3811 Waunona Way 221-2473
Dalton James W
3204 Winnequah rd 222-6887
Dalton John 1722 Troy dr 249-8375
Dalton Jos A 5013 Holiday dr 274-0524
Dalton Kirk D 1237 E Johnson 251-2695
Dalton LeNa 1033 Fiedler la 255-6190
Dalton LeRoy L 5058 Marathon dr 238-1994
Dalton Mary F 209 Crestview dr 222-6378
Dalton Norris K 2326 Lakeland av 244-1723
Dalton Thos J 2337 Heard 244-1884
Dalton W H 209 Crestview dr 222-6378
Daluge Richard 2019 Pine dr 271-6747
DALY also see DALEY DAILEY
Daly Donald L 319 N Few 256-3410
Daly James F 1610 Chadbourne av 238-0780
Daly John H 4909 Regal la 238-0462
Daly John J 1147 Rutledge 251-2678
Daly Kitty S Mrs 328 W Main 256-8130
Daly Mark J 2617 Kipling 249-7739
Daly Mary Terry Hunt 249-7753
Daly Richard F Dr
316 Cardinal Crescent 222-3964
Daly Richard T 614 Clemons av 241-0786
Daly Robt 3701 Burton rd 271-9513
Daly S L 4817 Sheboygan av 238-9279
Dam Marilyn 642 36th 257-7374
Dambach D E 237 N Marquette 241-3246
Dambekalns Paul 654 Orchard dr 271-9793
Dame Richard L 4414 Dwight dr 241-0407
Damer Jack 629 E Gorham 255-1412
Damgaard L E 403 Sennett ct 222-4486
D'Amico Rick 415 W Wilson 251-4298
Damm John W 1323 Chandler 251-6678
Damm Michael G Dr
3726 Nakoma rd 238-4034
Dammon Carrie 100 Division 241-0173
Dammon Dennis 2121 Univ av 238-2093
Dammon Lee J 81 Mt Horeb 437-5787
Dammon Oscar C
3833 Plymouth cir 238-3933
Dammon Steve 1009 Univ av 238-3292
Dammon John L 1309 Elder av 222-7715
Dammon Maurice R 1 De Forest 244-3251
Damon Andrew C
4123 Tonyawanda tr 222-4456
Damon Darlene R 5308 Mckenzie rd 222-1635
Damon Donald E Jos 2140 Regent 238-9873
Res 2536 Chamber av 238-4898
Damon Edw 314 Belmont rd 249-9655
Damon Jonathan S 1147 E Mifflin 257-6288
Damon M C 3634 Post 249-3801
Damon Merle 4606 Jay dr 249-7036
Damon Richard W 222-2951
Damon W H Mrs 633 Madison 255-1213
Damp B C 2130 Lakefield av 244-9501
Damp D V Mrs 2020 Glen av 238-6260
Damp V Henry 1057 Summerhill tr 274-2953
Damron Frances
5622 Shorewood blvd 238-2583
Damrow M A 117 N5 244-8309
Damrow Paul 2201 Post rd 274-0560
Dams Freibert 1101 Catalpa cir 256-0592
Damson L F 2272 S Beltline ct 257-7359
Dana Malcolm N 555 Glen dr 233-0648
Dana Marcia 536 Moorland rd 271-6802
Dana Michael 2302 Curry pkwy 271-7317
Dana P L 1558 Troy dr 249-2484
Dana Peter H 1052 E Johnson 256-0966
Dancek Char 109 S Randall av 255-2244
Dance Ian G 818 Terry pl 238-0913
Danchuk Geo A
7061 Eagle Heights Apts 238-6846
Dance Lawn & Garden Center
854 Cottage Grove rd 222-8632
Dandane Subhash 2514 Kendall av 238-1129
DANE COUNTY COLISEUM See Coliseum
DANE COUNTY CREDIT BUREAU
210 Monona av **255-2945**
DANE COUNTY CYTOLOGY CENTER
1202 S Park **255-5135**
DANE COUNTY DAIRY
1210 S Park **257-1006**
Dane County Democratic Assn
Adv W Gorham 255-5172
Dane County Democratic Party
317 W Gorham 252-3912
Dane County Farm Bureau
1010 E Wash av 249-7691
Dane County Farmers Co-Op—
Ofc 4404 Cottage Grove rd 222-8632
Feed Store 303 S Paterson 256-8373
Dane County Farmers Union Co-Op
2101 S Main Cottage Grv 251-9010
Dane County Head Start
1402 W Johnson 251-5405
Dane County Heart Assn See Wis Heart Assn
Dane County Medical Society
5 Parkside 257-6781
Dane County Mental Health—
See Mental Health
DANE COUNTY MENTAL HEALTH CENTER 31 S Henry **251-2341**

DANE COUNTY OF

For listings of City of Madison departments and agencies, see "Madison—City of"

For listings of State of Wisconsin Government departments and agencies, see "Wisconsin—State of"

For listings of United States Government departments and agencies, see "United States Government"

Government Services generally are listed alphabetically by organization

All offices of Dane County are listed below alphabetically by department. The several departments or agencies can be called directly by dialing the number shown for the specific location.

DANE COUNTY OF—

A

AGRICULTURE AGENTS—
County Agric Agts
210 Monona av 266-4271
4H Club Agt 210 Monona av 266-4271
Home Ec Agt 210 Monona av 266-4271
Hrtclr Agt 210 Monona av 266-4271
AGRICULTURE STABILIZATION & CONSERVATION SERVICE
210 Monona av 266-4365

C

CIVIL DEFENSE & DISASTER CONTROL—
Main Ofc 210 Monona av 266-4330
Radiological Defense Services
210 Monona av 266-4330
COLISEUM—
See Fairgrounds & Exposition Center
COOPERATIVE DAIRY HERD IMPROVEMENT ASSN
210 Monona av 256-0513
CORONER 210 Monona av 266-4210
CORPORATION COUNSEL
210 Monona av 266-4355
COUNTY ADMINISTRATOR—
Main Ofc 210 Monona av 266-4114
Personnel Ofc 210 Monona av 266-4123
Project Coordinator
210 Monona av 266-4127
COUNTY BOARD CHAIRMAN
210 Monona av 266-4111
COUNTY CLERK
Marriage License Information
210 Monona av 266-4452
County Auditor-Assistant
210 Monona av 266-4109
County Clerk 210 Monona av 266-4121
Deputy Clerk 210 Monona av 266-4122
Elections 210 Monona av 266-4122
Employment 210 Monona av 266-4123
Fishing-Hunting License
210 Monona av 266-4126
Insurance 210 Monona av 266-4125
Tax Description
210 Monona av 266-4120
Information 210 Monona av 266-4111
COURT SERVICES—
Juvenile Court Program
210 Monona av 266-4405
Detention Home
210 Monona av 266-4983
Reception Center
210 Monona av 266-4192
Juvenile Shelter
221 W Wash av 266-4476
COURTS
Clerk Of Courts Office—
210 Monona av 266-4241
Criminal & Traffic—
Main Ofc 210 Monona av 266-4311
Arraignment Clerk
210 Monona av 266-4877
Family Court Counseling
210 Monona av 266-4607

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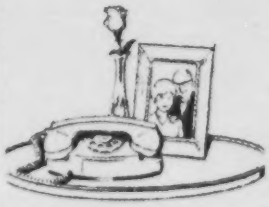
Free Estimates
840 W Lakeside **256-3718**

SOIL SERVICE CO Raymond rd ... 271-3434
STRUCK & IRWIN INC
826 Williamson ... **255-1673**
(Please See Our Display Ad Opposite Page)

Be Sure Your Phones Are Answered

Miss the folks you love?



Call them Long Distance

It's the next best thing to being there

Association Management

ASSOCIATION SERVICE CENTER
Specializing in Trade-Professional Associations
122 W Wash av **255-6751**
Boulton James Associates Inc
See Our Ad At Public Relations Counselors
106 E Doty 257-4664
Weber George W & Company
120 E Wilson ... 251-1933

Associations

See also "Churches", also "Clubs", also "Labor Organizations", also "Political Organizations"

AAA American Automobile Assn-Wis Div
433 W Wash av ... 257-0711
A S T D 6414 Odana rd ... 274-3440
Alcoholics Anonymous
Downtown Group 511 N Carroll ... 256-9682
East Side Group 853 Williamson ... 256-9368
Allied Mechanical Employers Council Inc 133 S Butler ... 256-6886
American Cancer Society Dane County Unit
444 W Main ... 256-4828
American Cancer Society Information Service 444 W Main ... 256-4828
AMERICAN CANCER SOCIETY-WIS DIV INC 611 N Sherman av ... **249-0487**
American Dairy Assn Of Wisconsin
4337 W Beltline hy ... 271-1021
American Homeowners Assn
313 Price pl ... 238-5882
American Institute Of Banking Wis State Chapter 14 N Carroll ... 256-0673
American Legion Post 57
116 N Few ... 257-7833
AMERICAN NATIONAL RED CROSS 1202 Ann ... **255-0021**
American Society For Training & Development 6414 Odana rd ... 274-3440

Listings of this classification are continued in next column

Associations—(Cont'd)

Arthritis Foundation-Southern Wis Dist
25 W Main ... 255-8528
Asphalt Institute 4333 Nakoma rd ... 271-3411
Associated General Contractors Of America Inc Wis Chapter
340 Coyier la ... 271-4722
ASSOCIATION SERVICE CENTER
Specializing in Trade-Professional Associations
122 W Wash av ... **255-6751**
Boy Scouts Of America
1930 Winnebago ... 244-3588
Bricklayers Local 13 1602 S Park ... 251-0585
Communications Workers Of America Local 5530 1400 E Wash av ... 255-2155
Consumer Relations Dept-Madison Chamber Of Commerce Inc
615 E Wash av ... 257-1700
Credit Union Natl Association Inc
1617 Sherman av ... 241-1211
Dane County Of
Cooperative Dairy Herd Improvement Assn 210 Monona av ... 256-0513
Holstein Breeders Assn Sales Ofc
210 Monona av ... 256-0513
Dane County Social Planning Agcy
621 N Sherman av ... 241-1244
Democratic Party Of Wisconsin
406 W Gilman ... 255-5172
Draft Counseling & Information Center
1001 Univ av ... 257-7979
East Side Business Men's Assn
3735 Monona dr ... 222-9131
Easter Seal Society Of Wisconsin
21 E Gorham ... 255-9489
F F A Foundation Sponsoring Committee
Donald N Mc Dowell Executive Director
303 Price pl ... 233-4222
Flexicore Mfrs Assoc
2116 Jefferson ... 251-3077
Funeral Society Of Madison ... 271-7508

Listings of this classification are continued in next column

Associations—(Cont'd)

Girl Scouts Black Hawk Council
2059 Atwood av ... 249-6661
Group Health Cooperative Of South Central Wis 923 Columbia rd ... 238-5660
Health Planning Council Inc
15 W Main ... 257-8624
Heating Piping Cooling Council
133 S Butler ... 256-6886
Humane Society
2750 Pennsylvania av ... 249-6656
Independent Garage Owners Of Wis
122 W Wash av ... 255-6751
INDEPENDENT INSURANCE AGENTS OF WISCONSIN
Paul H Mast Executive Secretary
7427 Hubbard av
Middle ... **836-6068**
Insurance Information Center Of Wis
110 E Main ... 257-2011
International Assn Of Machinists & Aerospace Workers-Lodge 1406
2021 Atwood av ... 244-1372
International Union Of Operating Engineers Local No 139
5001 Univ av ... 238-5151
Interstate Post Graduate Medical Assn
610 Walnut ... 256-5212
Junior Achievement Of Madison Inc
2154 Atwood av ... 249-7600
Kibbutz Langdon Inc 142 Langdon ... 251-9958
Kidney Foundation Of Wis
2048 E Wash av ... 241-1279
L A M P 1841 S Park ... 255-7604
League Of Wis Municipalities
122 W Wash av ... 255-7241
League Of Women Voters Of Dane County
130 E Wilson ... 255-5636
League Of Women Voters Of Wis
433 W Wash av ... 256-0827
Madison Area Safety Council Inc
615 E Wash av ... 257-1222

Listings of this classification ASSOCIATIONS are continued on next page

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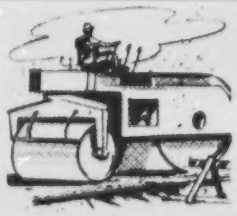

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professional directly and ask him if there is a local professional society. For example, you might call a doctor and ask him if there is a local medical society. Your local newspaper might also be of assistance, as well as your local library. If these methods fail, or if you determine that there is a professional society, but not within the geographic area served by your center (for example, you discover that there is a state association with no county or community branch), contact your network coordinator. He can help to arrange the collection of information from such associations so that the association will not receive duplicate requests for information from the many I&R centers in the network.

Contacting the professional society

Telephone the professional society and briefly explain the purpose of the information and referral center. Then ask for an appointment to see one of the officials of the society. The representative of the society may be able to fill you in on local patterns of practice and special services. The society officer may even be able to supply you with lists of those professionals in the area who specialize in serving a particular segment of the population (such as the aged or the handicapped). If the society publishes a newsletter, you may suggest that it inform its members of your center and program. You may also arrange to be sent copies of the newsletter to help you keep aware of the changes in your community in these areas.

Giving information about private practitioners

Suppose someone phones the I&R center and asks you to recommend a doctor (or lawyer, marriage counselor, or other professional). You would respond to such a request by saying that, although it is not the policy of the I&R center to recommend individual physicians, you would be glad to telephone the county or community medical society and ask them to consult their listing of doctors. You may ask the caller to explain his medical problem (Does he need a doctor engaging in internal medicine? Is she pregnant and in need of an obstetrician?) Once you have the telephone number of the caller, phone the medical society and get their suggestions about professionals to contact. Then call the inquirer back.

In some instances, the caller may be reluctant to discuss in detail the problem that has prompted him to call you. Offer to contact the appropriate society or association and leave his telephone number with them so that they can call him directly to give the needed information. If this is also not acceptable, then give the caller the telephone number of the appropriate professional society. Be sure to invite him to phone back if the society can be of no help, or if he needs additional information or help.

Occasionally, you may receive a request for information about private practitioners in your community who have not formed a city- or county-wide professional association. In such a case, try to find the appropriate category in the yellow pages under which the practitioner might list his services. A caller, for example, may wish information about a veterinarian. You would first check your resource file to see if an association of veterinarians exists in your community or county. If it does, you would offer to call the association to get the requested information. If such an association does not exist, you would suggest the caller contact one of the veterinarians listed under the "Veterinarians" heading in his telephone directory.

You should not usually make a personal recommendation of a private practitioner. In rare circumstances, you may decide to make an exception to this suggestion. If you do so, however, you may find that other practitioners will object to your singling out a specific individual to whom a referral is made. This could result in unfavorable publicity for your center and damage its effectiveness in serving the community.

CHAPTER 7: Organizing the Resource File

The resource file is the heart of each I&R center. Knowledge about all the human resources available in your community will be in the resource file. By carefully following the guidelines for creating and using the resource file, you will be able to supply accurate and thorough information about these services to those who ask you for help.

As previously discussed, the creation of the resource file will be time-consuming (it will take several months), but it is not a complicated process. Put simply, the process involves administering a resource survey booklet to all the facilities in your community and then transferring the information recorded in the survey to the resource file.

General overview

It may be helpful at this point to examine some of the tools which are necessary for a complete resource file. They are listed here in the order that you will use them:

1. Cross-reference file cards (3"x5")
2. Brochure
3. Resource survey booklet
4. Key word index
5. Facility file form
6. Facility file
7. Code card (5" x 8")
8. Master resource survey booklet
9. Facility notebook

Each of these tools is explained in detail in this manual; the purpose of this section is to give you an overview of the manner in which you will use them to build your resource file and to provide I&R service.

The steps for identifying each facility that provides human services and listing it on a cross-reference file card are discussed in Chapter 4. When you have a complete listing, on cards, of all available human service resources in your area, sort them in order of priority. Using an informational brochure slanted specifically toward facility directors (see page 102 in the Appendix), together with copies of local newspaper coverage concerning your I&R center that may be

available, approach facilities and set up appointments for interviews. This procedure is discussed in Chapter 5.

During the interview you may use a key word index to help the facility representative identify the portions of the resource survey booklet that should be filled out. As each completed survey is returned to the center, transfer this information onto a facility file form. This form should be designed to contain all necessary information about a facility on a single sheet of paper, to allow easy reference in providing I&R services. The facility file form serves as a summary sheet for the information gathered through the resource survey booklet. See pages 87-90 for a sample form.

Code cards (see page 86 for a sample, and Step 5, pages 44-47), should be prepared for each category or service marked in the survey booklet. These cards are your primary resource while providing I&R services.

When the facility file form is completed, the survey booklet for that facility can be filed. The facility file form should be duplicated, and a copy placed in a facility notebook for each person who will be providing I&R service. The facility file form is then placed in a folder, using a separate folder for each facility, and the folders filed by **facility number**. This becomes the facility file.

When the process of building your resource file is completed, you will have four information files:

- *Cross-reference file*, composed of cross-reference cards each listing one facility and filed alphabetically by facility name;
- *Facility file*, containing folders for each facility file form and all available data on that facility, filed numerically by facility number;
- *Facility notebook* for each I&R worker, containing copies of all facility file forms in numerical order by facility number; and
- *Code card file*, which contains all services in the classification system used by your resource survey booklet. This file may use either numbers or words. In some cases it may be a combination of both.

When your center opens its doors to the public, you will receive requests from individuals who may not know which facility can help them, but can only describe their problem. You will clarify the problem and relate it to one or more general service areas contained in your file. Next you will identify a specific **service code** (either a number or word) for that problem, and then determine if the service to meet that problem is actually available. If it is, you then will go to the **code card file** to find the facility numbers appropriate in

order to check your facility notebook for pertinent information concerning the facilities identified. At this point it may be necessary to obtain more information from the caller in order to determine which facility can best meet his needs. If a referral is appropriate, this would be the appropriate time to offer to make an appointment for the caller. This process is described in greater detail in Chapter 9.

Building the resource file

It takes eleven steps to build the resource file from the information contained in a completed resource survey. The chart on the opposite page is a summary of these eleven steps.

STEP 1: Assign facility number to each completed resource survey

The resource survey will be filled out as a result of a personal interview or mailing the survey to a facility for completion by the director or member of his staff. As each survey is completed, it must be assigned a facility number. The first completed survey will be given the number *1*, the second, the number *2*, the hundred and first, the number *101*, and so on. In other words, the completed survey booklets will be given consecutive numbers, called facility numbers. Mark the facility number of each completed survey on the survey booklet cover. If for some reason there are unanswered questions or problems in completing a survey, do not assign a number to that booklet until such questions have been answered. This will prevent delays in developing other parts of the resource system.

In cases where several centers are participating in an I&R network, it is useful to combine the facility number with a **center identifier code**. Use of such a combined number will result in a unique code number for each facility within the area served by the network. For example, a center identifier code might be *11*, and one of the facilities it surveys might be assigned the number 77. The complete facility number would be written as *11-0077*. The use of the six-digit center-facility number eliminates any possibility of confusion among facilities identified by each of the several network centers that may be assigned the same facility number (also see Step 5, paragraph 4, page 44).

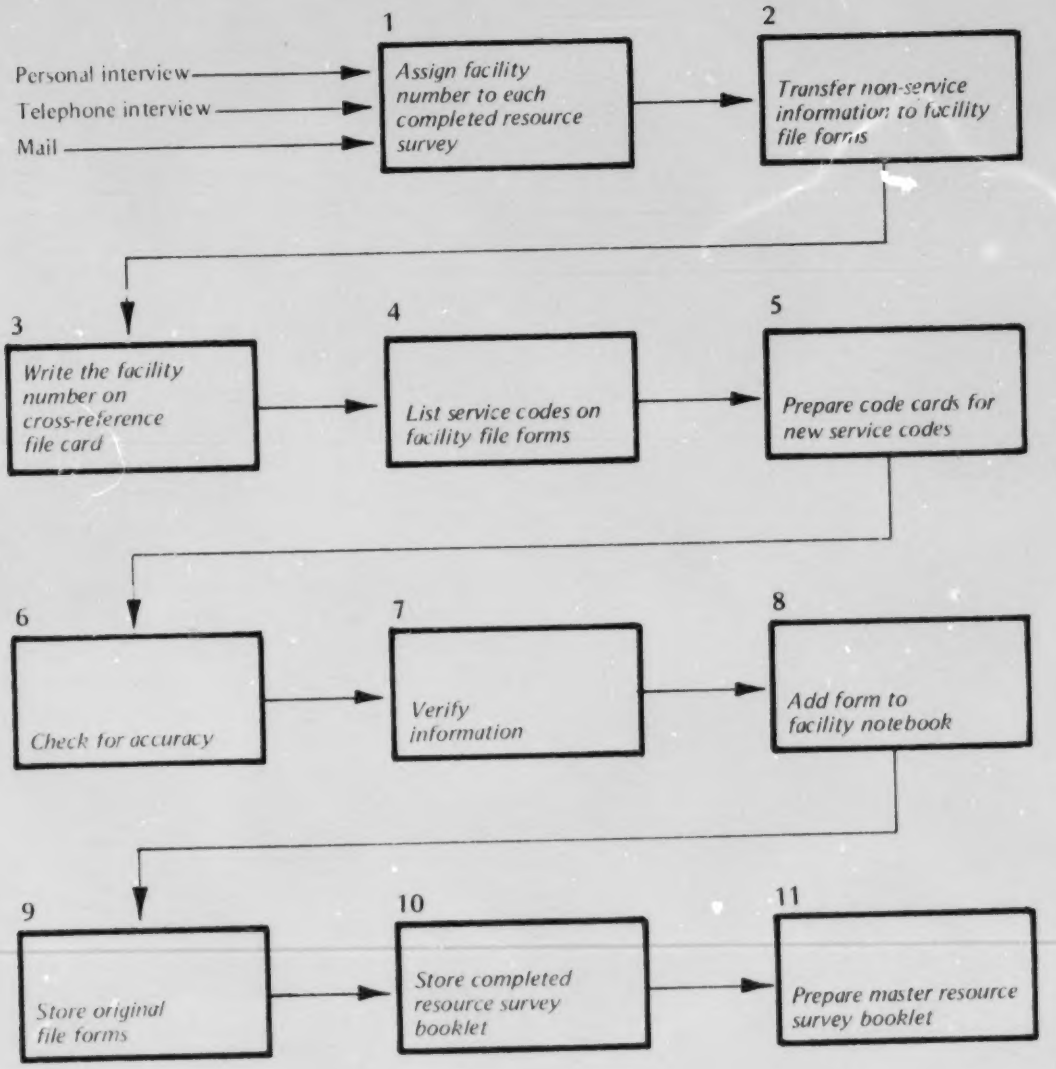
STEP 2: Transfer non-service information to facility file forms

Transfer the information describing the facility's hours of operation, fee schedules, etc., from the survey booklet to the facility file form (see pages 87-90 in the Appendix). Be sure to mark the facility number on the space provided on the facility file form.

STEP 3: Write the facility number on cross-reference file card

Write the facility number, the date of the first telephone contact, the name of the person doing the interview, and whether or not the resource survey booklet was completed on the cross-reference card you originally prepared listing the facility (see page 22). Return cards to this file in alphabetical order by facility name. This collection of

Eleven-step chart of the creation of a resource file



cross-reference file cards will enable you to check the progress you are making toward administering the resource survey booklet to the facilities in your community. Once all cards have been returned to the file in alphabetical order, it will serve as a permanent facility cross-reference file (see "A suggestion" on page 29).

STEP 4: List service codes on facility file forms

On the facility file form, under Section C (see page 87), check the service categories for which that particular facility provides service. If you chose to use a numeric code to classify the services provided by a facility, an arrangement such as Section J (pages 89-90) of the facility file form may prove useful for listing the service codes representing the facility's services. It is best to list numeric codes in increasing numeric order to facilitate locating a specific service code when you refer to the facility file form in providing I&R services. In order to make visual scanning of this section easier, you may wish to draw a line or make some other mark when you move from one service category to another. Be careful, however, to mark between rather than within the boxes. If you chose not to use a numeric code for classifying services, you may wish to prepare a modification of Section J that contains columns of parallel lines on which to write out the words for the specific services offered.

STEP 5: Prepare code cards for new service codes

The code card file is the heart of your information-retrieval system. The filing system described in the next paragraphs is based on a method known as the Uniterm System of Indexing [Documentation, Inc., 1955]. It may be used with either numbers or words. In the next chapter, additional uses of this filing system are discussed in order to help you make your resource file as flexible and responsive to the needs of your I&R center as possible.

Although this manual was written primarily for those who are setting up non-automated information retrieval systems, the methodology lends itself readily to computerization. If you are thinking of computerizing your resource file eventually, it is better to start with a classification based on numbers rather than words.

After you have filled in Section J of the facility file form, prepare a code card for each new service code listed on the facility file form. Enter the service code on the top of the 5"x8" code card. Notice that each code card is divided into ten columns. Write the facility number in the appropriate column on each of the code cards.

Put the facility number in the column according to its *last* digit (*not* according to its first digit). Thus, a facility given the number *083* would be listed in the *3's* column. It is important to list the smallest number at the top of each column, and to keep the column in order of increasingly

larger numbers. Listing numbers on the code card according to their last digit makes it much easier to compare cards and match facility numbers to see if a person with several problems can get help at the same facility. (See examples below and on page 46.)

Omit the center identifier code from facility numbers for facilities that were inventoried by your center; list all such facility numbers first on the code card. If there are resources that are located outside of the area served by your center (see pages 49-50), but that may serve residents within your area, list them by complete facility number, including the two-digit I&R center identifier code. These facility numbers should also follow the order of increasingly higher numbers. For example, list all facility numbers for center *07* before going on to center *10*. If center *07* has more than one resource, list the facility with the lowest number first, and then in increasing order (see below).

Example of a code card

Uniforms (work clothing), men's - financial assistance

CODE CARD

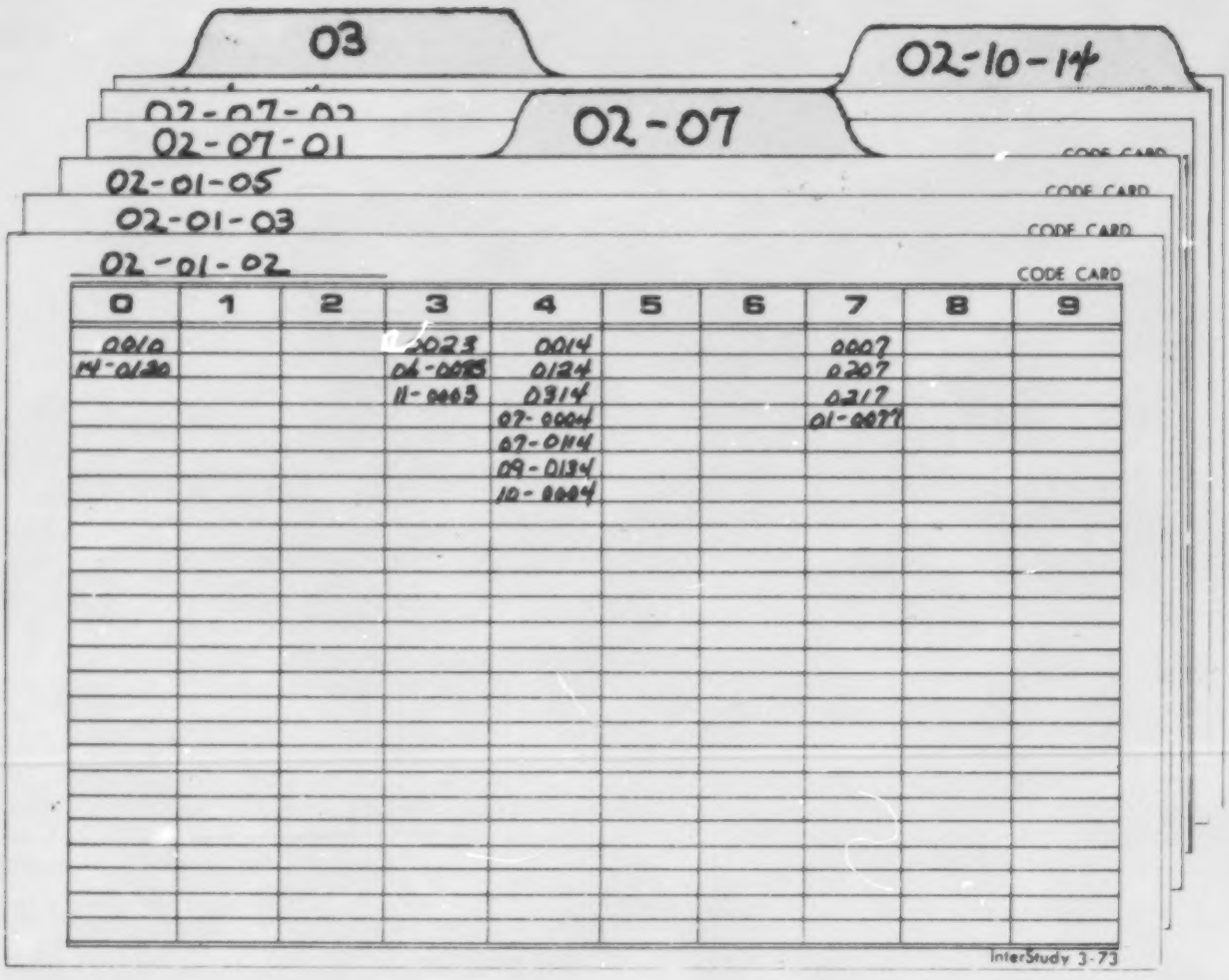
0	1	2	3	4	5	6	7	8	9
0010	1021		0025	05-0014		0376	0007		
0120			0083				0017		
			0643				0187		
							0207		
							08-0211		

InterStudy 3-73

By listing first those facilities located in the area canvassed by your center, you will be able to identify efficiently the resources most conveniently available to those living in your area. However, knowledge of resources located outside of your area may be useful at times. For example, there may be only one facility in your area that provides a particular service, and it may have a long waiting list or the caller may be ineligible to receive help from that facility for some reason. Knowledge of selected facilities outside of your area would then be very valuable in providing help to such a caller.

Arrange the code cards in numerical or alphabetical order and place them in filing boxes. If you are using a mixed

Example of numeric code cards as they will appear in the file box (slightly reduced)



system of words and numbers, it would be best to have two separate files. The use of a tabbed file-card divider to separate each of the major classification categories makes it easier to locate a specific code card once the resource file is completed. An example of numeric code cards as they might appear in the file box is shown on page 46. (Code cards using words are shown on pages 45, 59, and 61.)

STEP 6: Check for accuracy

When you transfer the information in the resource survey booklet to the facility file forms and the code cards, you may find that certain information is missing or that certain information is obviously incorrect. You should telephone the facility immediately to clarify incomplete, erroneous, or missing information. Checking for accuracy is important.

STEP 7: Verify information

Verify the information that you transfer to the facility file form by sending a completed copy of the file form to the facility director for signature and return within two weeks (see pages 91 and 99 in the Appendix).

STEP 8: Add form to facility notebook

When information on the facility file form is complete and verified, reproduce the form so your staff members can add it to looseleaf notebooks they each will keep for that purpose. Copies of each facility file form, filed according to facility numbers, make up the facility notebook. (Some photocopying equipment allows copying on both sides of a page; this could save space if your notebooks become too cumbersome.)

Some centers find it convenient to include an alphabetic index (by facility name) in the front of the facility notebook. In essence this is derived from the cross-reference file by copying the facility name (including AKAs*) from each card in the file and designating the facility number opposite the name. This permits the facility notebook to be used more as a traditional service directory. If such an index is prepared, care must be taken to include facilities which are added to your resource file from other centers in the network, but for which you do not have the cross-reference file card.

STEP 9: Store original file forms

Place the original facility file form in a storage file along with any brochures or other materials you may have gathered about that particular facility. This set of original facility file forms and materials is called the facility file.

STEP 10: Store completed resource survey booklet

File the completed resource survey booklets in regular numerical order, according to their facility numbers.

STEP 11: Prepare master resource survey booklet

Depending on the design of the resource survey booklet that you use, it may be possible to develop a master survey booklet. The master booklet is a summary of all

*"Also Known As": other names by which the facility might be known. See page 22 for a discussion of AKAs and the cross-reference file.

services available in your area. It will enable you to see at a glance whether or not a specific service is available. It will also reveal services that may be needed, but that are not yet provided.

The possibility that you might want to make a master booklet should be considered when you are selecting a booklet for use in your center. The key design feature that will permit you to prepare a master booklet is a check-list format. If the resource survey booklet that you are using for your resource file development has this check-list format, it is an easy matter to go through your code card file after your last facility interview and check off in a blank copy of the resource survey booklet all services that are contained in the code card file.

Copies of the master booklet may then be prepared for all individuals working at your I&R center. Once you have identified the appropriate service for a caller, you may check the master booklet to determine whether or not there is a facility that provides that service. If a check-mark appears for that service, the next step would be to refer to the code card file to determine which facilities provide that service. Further details on using the resource file to provide information and referral are contained in the publication *Information and Referral Services: Information-Giving and Referral* [InterStudy, 1973].

What to do about services that are not included in the resource survey booklet

Although most resource survey booklets have been designed to be comprehensive, a facility will occasionally offer a service that cannot be found in the service classification scheme. Most surveys have either blank spaces, or "miscellaneous" or "other" sections within each major subdivision to provide flexibility in recording such services.

However, when you return to the I&R center and begin transferring the information to the resource file, pause a moment when you come to this "new" service. Is it really new or can it be found, worded in a slightly different manner, elsewhere in the resource survey booklet? If a key word index exists for the survey you are using, it should be very useful in helping you make this decision.

Infrequently, a facility will provide a service that cannot be found elsewhere in the service categories of your survey booklet. This new service must be given a temporary service code designation. Because it is important that your resource file be identical to the others in the I&R network, all new codes will be assigned a permanent number only by the network coordinator. When you come across a service not already listed in the survey booklet, submit the information to your network coordinator for a permanent number.

Distributing components of the resource file to your staff

The decision about which components of the resource file to distribute to members of your staff will depend upon such factors as the volume of inquiries your center receives, the physical layout of your office, and the number of people working in your center.

Each full-time staff member should have his own facility notebook. Each full-time staff member should also have his own copy of the master resource survey booklet, if one exists. Most likely a centrally placed code card file could serve all staff members who need access to it.

In individual centers, however, the volume of inquiries may be so great that having only one code card file could cause confusion and delay in providing information to users of the center. Or the physical layout of your center may make it inconvenient to have only one code card file.

Regardless of how you decide to distribute the components of the resource file, it is important that any changes in the information in the file be entered systematically into everyone's copy of the file.

The easiest way to solve this problem may be to appoint a **resource file monitor.** This monitor should be notified of all recommended changes in the components of the resource file and in the key word index, if one exists. He should also be responsible for keeping the I&R staff and the network coordinator aware of such changes.

Including resources located outside of your center's geographic area

There are two kinds of resources you may include in your center's resource file that will probably be located outside of the geographic area served by your center. The first is facilities that are intended to serve the people in a wide geographic area, such as a state hospital. The second is a resource that may be needed by one of your center's callers, but which is not currently available in your area.

Resources that serve a wide geographic area

Many resources are available to all people, regardless of residence. To avoid confusion, each center will canvass only those facilities located within its geographic boundaries of service. However, whenever a facility is identified that is intended to serve a larger segment of the population, a special report on that facility will be given to the network coordinator. The report will consist of the facility reporting form (page 92 in the Appendix) and a copy of the facility file form for that facility. The consultant will enter this information into the network office copy of the resource file, and then provide all participating centers with a copy of the facility file form for that resource. This information will be entered into the resource file of each center.

The center preparing the original facility file form will be responsible for updating the information for that resource.

The network coordinator will be responsible for providing updated information about such resources to other participating centers. Each center monitor should assume responsibility for reporting to his network coordinator any changes that are learned of informally, such as through discussing a referral to that facility.

If an I&R network is being developed on a state-wide basis, it is extremely important to coordinate interviews of certain kinds of facilities through the network office. This is so because the network office must do some ground-work for certain state-wide facilities that have many branches. For example, the agricultural extension service will be an important entry in the resource file of centers serving rural areas. If the network office contacts the central administrative office for such a service (such as the state university), the branch offices can be prepared to receive you. In other cases, where services in all branches are quite standard, one interview with the central administrative office may make unnecessary detailed interviews in branch offices. After receiving the facility file form from the network office, you may simply wish to verify hours of operation and check for any variations from the services described in the central office.

Resources that are not available in your area

Your center may receive a request for a service that is not available in your area. You may contact your network coordinator to learn if the needed service is available elsewhere in the state. If it is, your coordinator will provide you with the necessary information (over the telephone) about the facility providing it. You may also ask that he send you a copy of the facility file form so that you can include that facility as a permanent part of your resource file. (You should follow the same procedures for entering this facility into your resource file as those discussed on pages 42-48.) Your coordinator will then see to it that you receive updated information about the facility as it becomes available.

In the case of facilities that are not within the geographic boundaries of any center, or that serve all areas, your coordinator will determine if a nearby center can contact that facility. That facility will then be permanently assigned to that center for the updating and revision of its facility file form.

CHAPTER 8: Increasing the Flexibility of Your Resource File

The principles used in developing the service code card file may be applied to other important information that you may wish to retrieve on a rapid basis. For example, you may wish to know which facilities provide service on a twenty-four hour basis. Using a blank code card, you can treat this information in the same manner as the service information. Write "Twenty-four Hour Service" at the top of the code card, and then list all facilities that provide service on this basis in the appropriate column just as you did in Step 5 (pages 44-47).

Perhaps you wish to be able to identify quickly those facilities that have specific eligibility restrictions, such as providing service only to individuals whose incomes are more or less than a certain amount. Choose a brief heading that will enable you to find this information in your file, such as "Income: below $1600" and list (in the appropriate columns) all facilities that may have this as an eligibility restriction.

Keep these cards in a file box separate from your service code card file in order to avoid "losing" a card in the wrong file. It may be useful to have code cards for this purpose printed on a different color stock in order to be able to identify a misplaced card easily.

Another technique that can make your resource file more flexible is to prepare a set of code cards according to geographic location of the facilities. You may wish to use zip codes, census tract numbers, counties, cities and towns, or grids from an ordinary road map available at any gasoline station. Census tract information may be obtained from the U. S. Department of Commerce, Bureau of the Census. Field Offices are listed on page 104 in the Appendix.

Although more difficult and costly to obtain, maps have been prepared by the Bureau of the Census that accompany the series of reports titled *Census of Housing: 1970 BLOCK STATISTICS*. They provide an ideal tool for developing a geographic coding index for locating facilities that are in areas that have been tracted by the Census Bureau. A list of communities for which such reports should be available is reproduced on pages 105-106 in the Appendix. It should be noted that not all areas of a state are necessarily covered by these reports. If the area served by your I&R center does not seem to be completely covered by the reports in this

list, contact the nearest field office of the U. S. Department of Commerce, Bureau of the Census, for more complete information.

The method you choose to develop a geographic coding system for the facilities included in your resource file will depend on the unique knowledge you have about your community and the area served by your center. If your center is part of a network, it is likely that recommendations for geographic coding will be made by your network coordinator in order to assure that such information in one center will be compatible with that in other centers in the network.

The following figures are presented to acquaint you with the maps available in the Block Statistics reports. More densely populated areas are divided into a number of sections or sheets to permit details to be easily shown. An index to the sheets for Madison, Wisconsin, and adjacent areas is reproduced on page 53. Part of the detail from Sheet 3 is reproduced on page 54. Note the large number marked *a*. This is the census tract number. The smaller number marked *b* is the "block" number. By using a combination of census tract and block numbers, you can develop a comprehensive geographic coding scheme for the area served by your center.

If you are serving an area that has not been tracted by the Census Bureau, you will probably find that the most convenient code number to use is that of the "minor civil division" (MCD). In most cases the MCD will enable you to code at the level of a township. If there are smaller towns or cities within a township, these will have a unique MCD code. The utilization of MCD coding in less populated areas is illustrated on page 55.

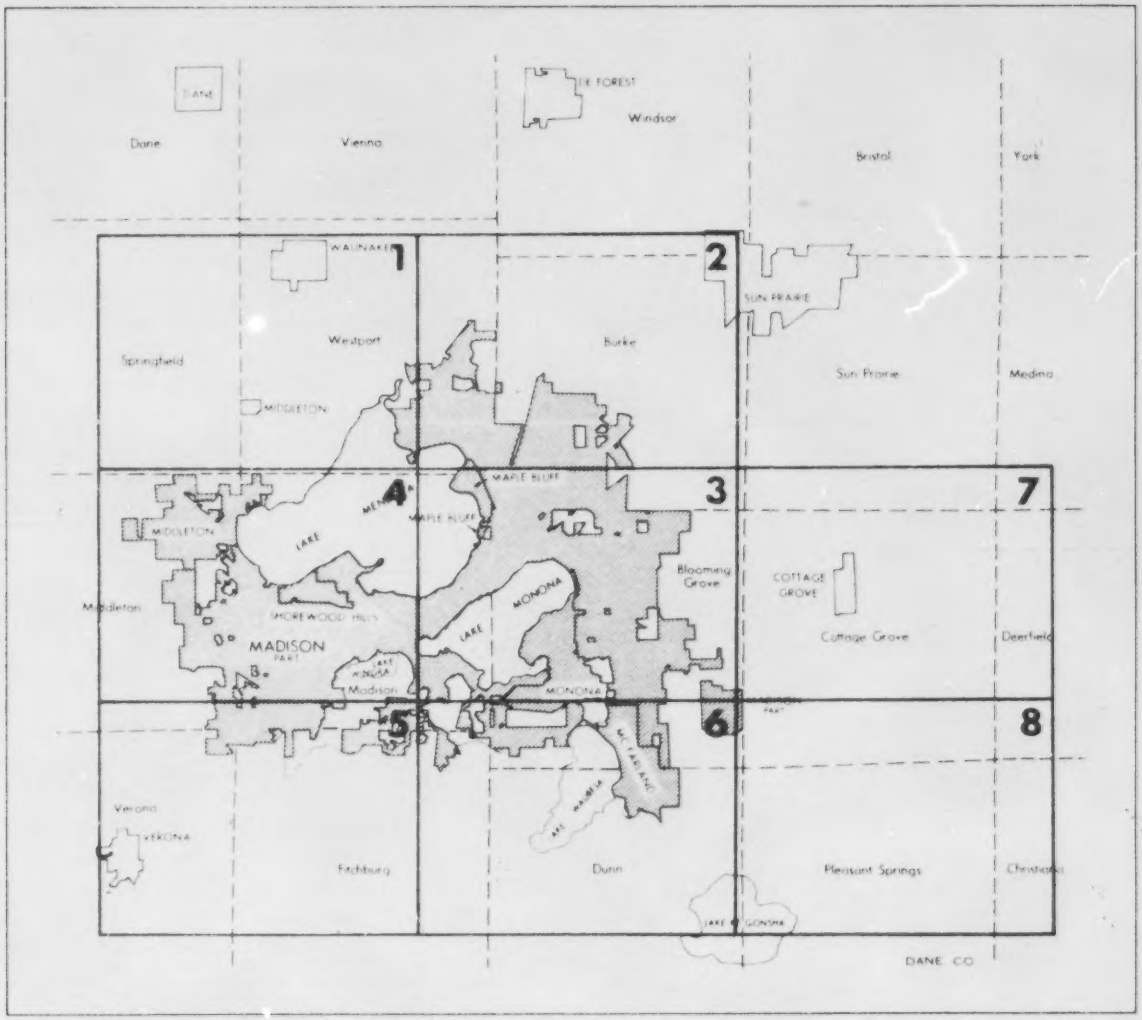
If your center is a member of a network of I&R centers, you may also wish to use a state and county designation in your geographic coding scheme. This will permit you to give a unique numerical designation for the geographic location of any facility included in your resource file. The information needed for a complete geographic coding system for a center that covers both tracted and untracted areas can be arranged as in the format reproduced below. (The numbers are the code for Madison, Wisconsin; the format is similar to that used in the facility file form reproduced on page 87.)

State	County	M C D	Place	Tract		Block
				Basic	Suf	
5 5	0 2 5	1 3 5	1 4 7 5			2 1 0

Format for a comprehensive geographic coding system based on Census Bureau scheme.

Index to map sheets contained in the Block Statistics Report for Madison, Wisconsin*

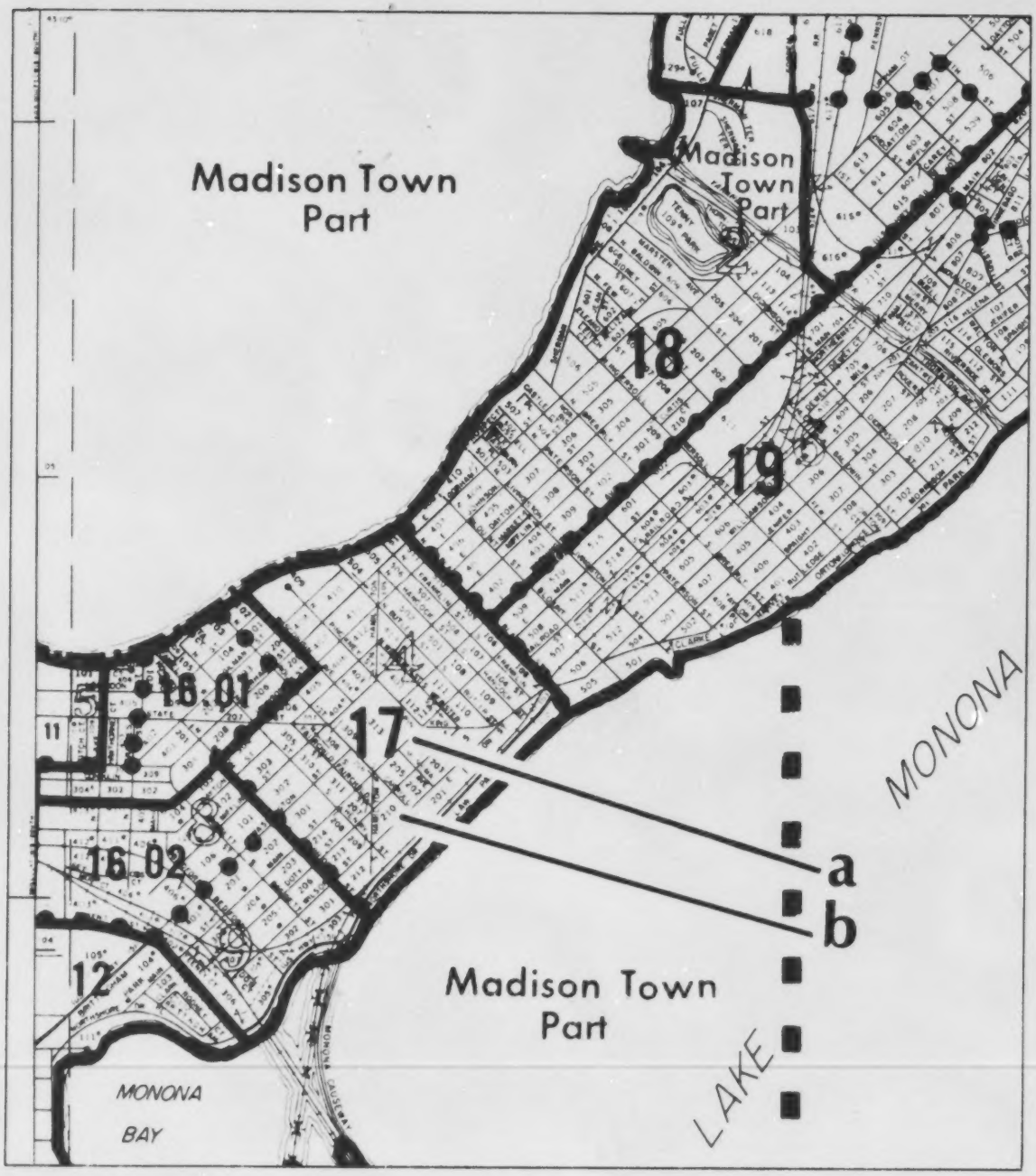
INDEX TO SHEETS



1970 Census of Housing
BLOCK STATISTICS
MADISON, WIS. URBANIZED AREA
HC(3)-270

*U.S. Department of Commerce, Bureau of the Census, HC (3) 270, 1971.

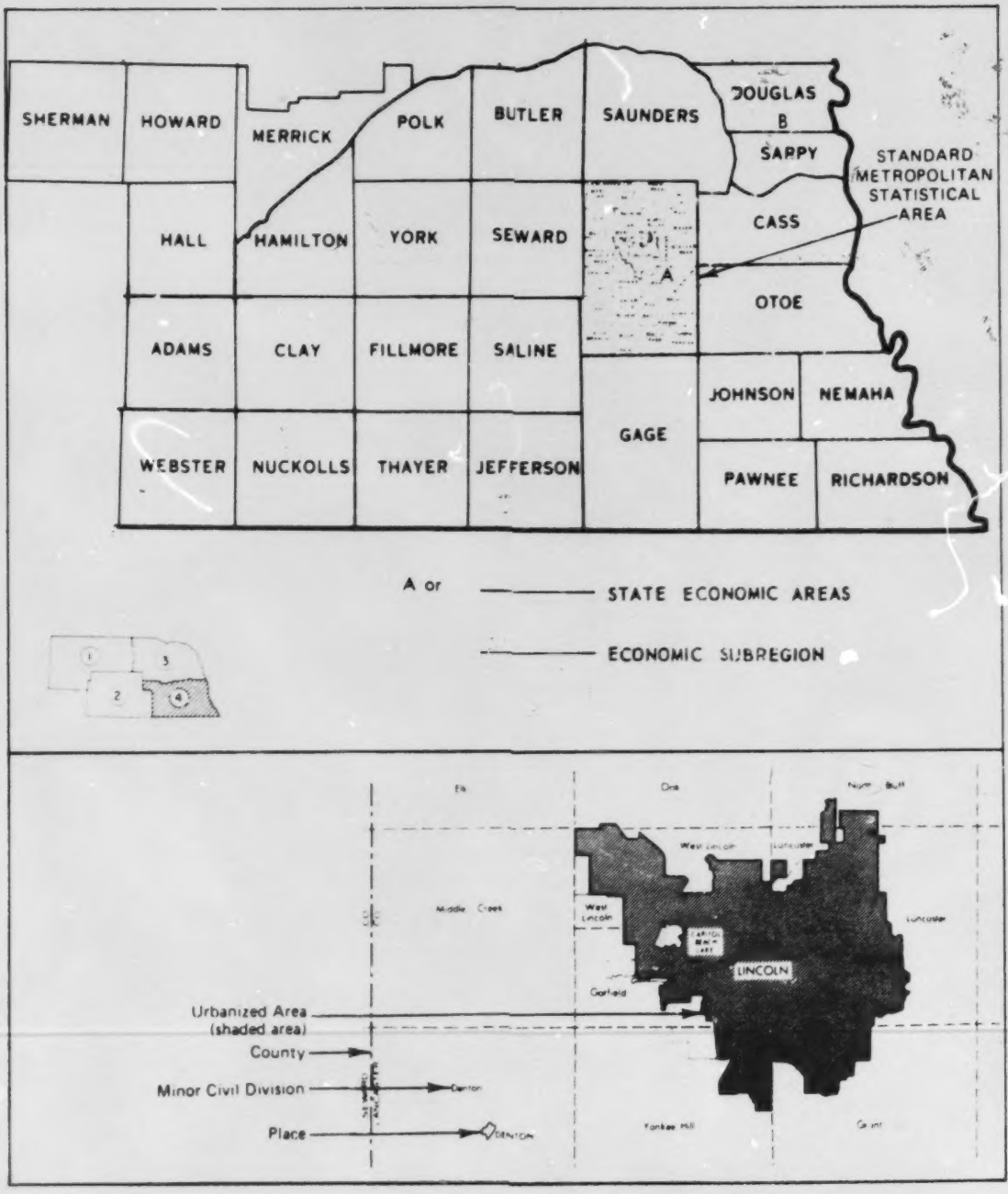
Section of detail from sheet 3 of the Block Statistics Report*



*U.S. Department of Commerce, Bureau of the Census, HC (3) 270, 1971.

Census Bureau Geographic Identification Code Scheme for different kinds of geographic areas, including MCD's*

This schematic shows the relationship of the various geographic areas described in the 1970 Geographic Identification Code Scheme.



*U.S. Department of Commerce, Bureau of the Census, 1972, page vii.

One obvious advantage to the use of the Census Bureau geographic coding scheme is that it will enable you to make comparisons of the clients served by your center with the baseline information available from Census Bureau statistics. For example, suppose you are concerned that your I&R center reaches the aged poor as a particular target population. By following the Census Bureau geographic coding scheme in keeping track of those using your I&R center, you will be able to determine whether the proportion of poor older people using your center is larger or smaller than the proportion of individuals of that age and income level who live in areas served by your center.

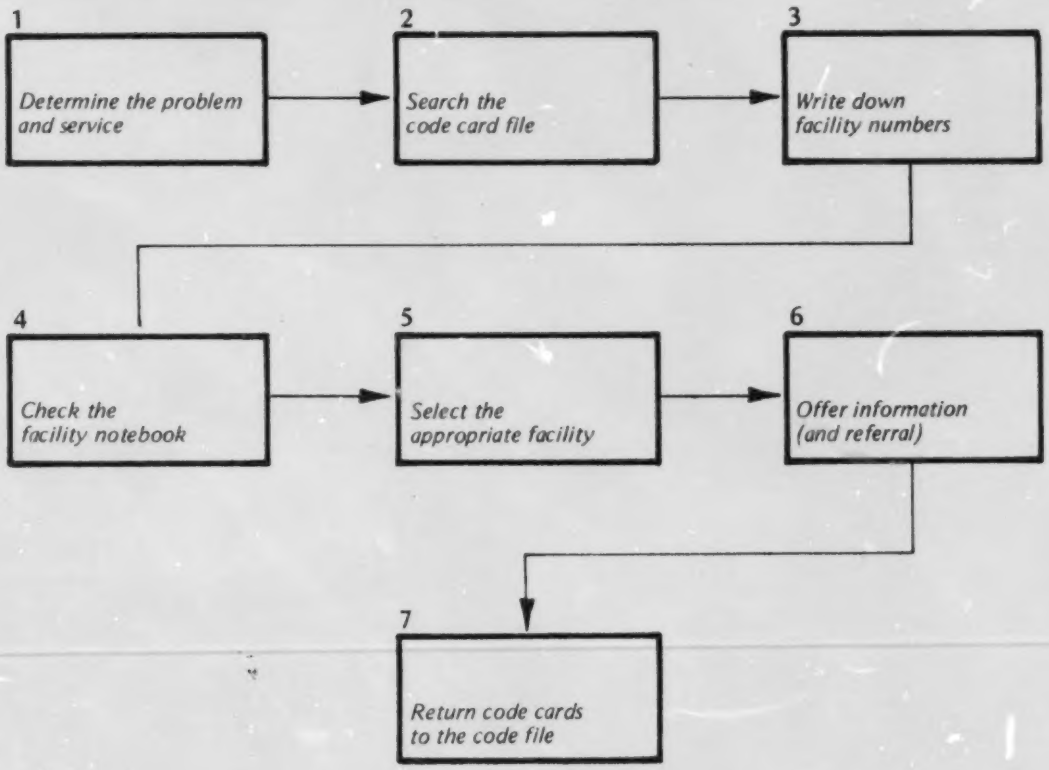
The geographic coding of services will enable you to provide better I&R services by enabling you to send people to the closest available service facility for their problem. It will also enable you to evaluate your own service: Are you reaching the people you want to be reaching? Beyond internal evaluation, you will also be able to identify geographically where new services are needed and should be located. Example 2 (page 60) in the next chapter shows how the geographic code can be used to provide information and referral service.

CHAPTER 9: Using the Resource File*

The resource file has been designed to make your use of it easy and trouble-free. In this chapter you will find directions on how to use the resource file to help those calling the I&R center. The chart below summarizes the steps involved in using the resource file.

STEP 1: Determining the problem and service

Frequently an individual who contacts the I&R center will have some difficulty defining the precise nature of his problem. You will have to ask a series of thoughtful and tactful questions to help the caller to specify his problem. Once the interview has proceeded to the point where the problem can be identified, you will have to decide which



*See InterStudy, 1973, for a discussion of many of the topics mentioned here.

services are appropriate to help the caller solve or cope with his problem. You may refer to your key word index for assistance in making this decision. Then, using the master resource survey booklet as a guide, determine whether or not that service is available. That is, is there a provider of that service listed in your file (as indicated by a mark in the master booklet)? As you identify problem/service intersections, write down their code numbers.

Frequently a person will have more than one problem. If you sense that this is a possibility, probe tactfully to see if he or she has related problems. For instance, a mother who phones the I&R center about job-training programs may also need information about making arrangements for her children during the day (perhaps day care centers exist in your community). Or a woman may phone to request information about placing her mother in a nursing home.

Example 1 *A caller requests information about nursing homes for her mother. As you discuss her mother's situation, you learn that she lives alone, recently has been unable to prepare meals for herself, and has allowed her small apartment to get very dirty. She appears to be growing steadily weaker. It turns out that there is a family history of cancer, and the caller is fearful that her mother may have this illness.*

You may feel that a cancer-screening examination should be sought first. If the results are negative, and there appears to be no other health problem, homemaker services may be helpful, along with some kind of meal program.

Turning to the master booklet you learn that cancer screening services are available, that homemaker services are available, and there are several choices available with regard to a meals program.

Next you pull the code cards for the codes identified as relevant for this caller (see opposite page). You scan each column on each card, taking note when you find facility numbers that match with each other. On this particular set of cards, there are two facility numbers that appear more than once: 0043 and 0053. You will note, however, that the codes with which facility 0043 is associated are only for meal services; those with which facility 0053 is associated are for both housekeeping and meal services. Therefore, other things being equal, facility number 0053 appears to be the better choice. Then you check the facility file form for specific eligibility requirements that the caller's mother would have to meet for these services. You find that the caller's mother should be eligible, and give the caller the necessary information about the facility.

Comparison of facility numbers for Example 1

Cancer Screening

CODE CARD

0	1	2	3	4	5	6	7	8	9
	0011	0012	0163		0005	0016			
	H-0091	0032			0135	0096			
		0062			0245	0106			
					01-0115				
					02-0015				

Meal Programs, Portable

CODE CARD

0	1	2	3	4	5	6	7	8	9
0020	0091	0052	0003			0026	0007		0019
0040	0121	0082	0013			0046	0057		0029
		0092	(0053)			0116			0079
		0102	0133						0109
			0273						

Meal Programs

CODE CARD

0	1	2	3	4	5	6	7	8	9
	0031	0042	(0043)	0074	0015		0117	03-0018	
	0051	0112	12-0233	0164	0045		03-0247		
		0232							

Meals, Homemaker Services

CODE CARD

0	1	2	3	4	5	6	7	8	9
0030	0021		(0043)		0255				0039
0110	0041		(0053)		0070				0149
	0221		06-0193		0115				
			10-0043		08-0456				
					08-0615				
					11-0065				

Housekeeping Services

CODE CARD

0	1	2	3	4	5	6	7	8	9
		0022	0023	0024	02-0049		0037	0328	
		0242	(0053)	0504					
			0173						

By carefully discussing the reasons the inquirer wishes this information, you may learn that her mother is not seriously ill (and therefore does not require nursing home care) but that she simply needs help maintaining and cleaning her house or apartment and preparing meals. In this particular care, you may suggest that the caller contact the welfare department to arrange for her mother to be sent a county homemaker, a service that exists in many communities, and that she be provided with some form of meals program.

Thus, by referring to the master resource survey booklet, and sometimes to the key word index, you will help the inquirer to define his or her problem and you will be able to determine the services needed.

Either ask the caller to "hold" or tell him that you will call back in a few minutes when the information has been found. This will depend on how easily you can find the necessary information. It is always better for you to call back, rather than to ask the inquirer to call you back. If the caller is at the center, ask him to wait a few minutes. If he cannot wait, assure him that you will call him as soon as you find the information.

Example 2 *You decide from an interview with a caller that the service needed is physical therapy for the caller's wife, who has recently returned home from intensive hospital care for a stroke. The wife has fortunately regained much of her pre-morbid functions, but continuing physical therapy has been recommended for the next several months. Although the hospital is willing to continue her as an outpatient, it is some distance away from her home. The caller no longer drives a car, and the family resources are too limited for the visits to the hospital to be made by taxi.*

Turning to the code card for physical therapy for stroke (see opposite), you determine that this service is available at a number of facilities in the community. You select from your special file the geographic card for the census tract in which the caller's home is located. In comparing the two cards, you determine the wife may be able to obtain physical therapy at a facility (0082) much closer to her home than the outpatient department of her former hospital. Further investigation reveals that this facility is on a busline that is very near her home. If it is not feasible for her to take the bus, the distance of traveling to get the needed service is much less than before, and the taxi fare may now be within the means of the family.

So you give the caller all the information he needs about the facility to contact it and arrange for the needed service for his wife.

Comparison of facility numbers for example 2

Physical Therapy

CODE CARD

0	1	2	3	4	5	6	7	8	9
0190	0011	0042	0183	0014		02-1016		0008	0789
	0121	(0082)		0564				0138	
	02-0171	0112		0784				0408	
	03-0101	10-1062						0588	
	11-0001								

025-135-N75 (Geocode)

CODE CARD

0	1	2	3	4	5	6	7	8	9
	0021	0012	0643			0006		0238	
	0041	(0082)							

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STEP 2: Searching the code card file

Look up in the code card file the problem/service code(s) you have listed.

STEP 3: Writing down facility numbers

Write down the appropriate facility number or numbers from each code card.

STEP 4: Checking the facility notebook

Next, turn to your facility notebook, which contains copies of facility file forms in numerical order. Find the form(s) with the facility number(s) you have written down. Each facility file form has a detailed description of the facility's accessibility and eligibility requirements.

STEP 5: Selecting the appropriate facility

If many facilities have been located, you should recommend those that seem most appropriate from the standpoint of the caller's problem. When deciding whether or not a facility is appropriate, you should consider:

- The number and kinds of problems a facility can handle. Some can handle only a few kinds of problems; others can deal with a great many. If the caller has identified more than one problem, you may find by scanning the facility numbers on the appropriate code cards that the same facility may be able to help the caller solve several of his problems. (If there are a great many facility numbers on the code card, and/or if the caller has more than one problem, this comparison may take place in Step 3.)

  All things being equal, you should send a caller to one facility rather than to several, if that one can help him with many of his problems. (See example 1 on page 58.)
- Whether the caller appears to meet whatever eligibility requirements the facility may impose.
- Whether the facility charges fees the inquirer can afford.
- Whether the location of the facility presents any problems for the caller. For example, is it near a bus line? Does it have entrance ramps and elevators for wheelchairs? (See example 2 on page 60.)
- The particular problem or problems of the caller. Does any aspect of the problem suggest that one facility may be able to serve him better than another? Or that he would be more likely to accept the services of one facility over another?

STEP 6: Offering information (and referral)

Once you have reached a decision, get in touch with the caller and give him the information you have found. You may also offer to make a referral appointment for the caller.

STEP 7: Filing code cards

Once the inquiry has been answered, make sure that the code cards are replaced in the file in the correct numerical order.

Conclusion

The chart on page 57 shows the steps involved in using the resource file. As you continue working in the I&R center, you will grow more and more familiar with the contents of the resource file. This familiarity may tempt you to stop using the file. In some obvious instances (for example, when there is only one facility that handles a problem) bypassing the file may be all right. But as a general rule you should always consult the file – even if it only serves as a check on your memory. Data gathered on the facilities to which you direct or refer people will help you keep track of how many of the community resources you actually are utilizing in your I&R activities.

CHAPTER 10: Keeping the Resource File Current

Even the best resource file loses its value very quickly if it is not kept up-to-date. There is no sense in expending a lot of effort and money creating a resource file if you do not ensure that the file will remain current. You can expect to be making two kinds of changes in the file:

- Correcting minor errors, omissions, and changes in current files.
- Updating your file with major new reports from existing and new facilities.

It is far better to update a portion of the resource file every few months than to attempt to update the entire file at one time. It is suggested that one-third of the file be updated every three months. In this way, the resource file can be kept current with minimal daily effort.

Making changes

Perhaps an address has changed, or a facility policy has been altered; perhaps a facility claims to offer a service, but the experiences of I&R inquirers referred to that facility suggest that the service is not really available. The change must be systematically entered into all components of the resource file. If there is no systematic procedure, then each member of your staff will be aware only of those bits and pieces of valuable information that he himself discovers. Errors will continue to be made by other members of the staff in your center. If a correction is identified and later forgotten, it is lost to everyone.

There is a simple procedure for this purpose. The person identifying the change should communicate the change to the resource file monitor. The monitor will then enter the change in the filed copy of the facility's resource survey booklet and in the original facility file form. In addition, he must also enter the change in all other copies of the facility file form, including all individual facility notebooks, and all master resource survey booklets. A copy of the revised facility file form must be sent by the monitor to the network coordinator. The coordinator will assume responsibility for notifying other centers about the change, when this is necessary.

Updating is a constant process, and it will be wise for

the resource file monitor to select a specific time each day in which to make corrections. This will ensure that the resource file is kept current, and that changes are not put off or forgotten, and at the same time not cause a serious encroachment on time allotment for other duties of the person selected as monitor. Depending on the size of your resource file, the monitor's task may require a very considerable amount of time. (In some large cities one or two people may have this responsibility full-time.)

Making an addition to the master resource survey booklet is simply a matter of locating and noting in red pencil or marker the appropriate service description. (It may already be marked, in which case no further action is necessary.) Making a deletion from the master survey booklet requires one extra step. If a facility ceases to offer a service formerly recorded as being available from it, you must first look at the appropriate code card. If the facility in question is the only one that offers the service (that is, if there is only one facility number on the code card), then remove the mark from that service in the master survey booklet. If any other facility numbers appear on the code card, then no change in the master survey booklet should be made, since other community facilities offer the service in question.

If the errors and omissions being corrected have to do with the services offered by a facility (rather than, for example, simple address and telephone changes), the appropriate code card or cards must also be changed. If your center has more than one central code card file, the resource file monitor should follow the same procedure described above for changing facility forms.

In order to add a facility number to a code card, simply add the number to the proper column (see page 44), making sure that the numbers in the column are in order of increasing value. If the addition of a new facility number at the bottom of a column on the code card will cause the numbers to be out of sequence, make a new code card, putting the numbers in proper sequence. Then destroy the old code card. To delete a facility number from a code card, simply erase it or cover it with white correction fluid or tape. A copy of the revised code card should also be sent to the network coordinator.

Making major corrections and additions

Facilities change but they sometimes do not publicize their changes. Periodic formal updating of the resource file will enable you to keep up on any important changes that may have occurred since you last contacted a given facility. Informal updating as a result of information exchanged between a facility and your center in providing I&R services for an individual caller will be an on-going process; but it does

not assure that you will have covered all changes in the facility on a systematic basis. Other methods of informal updating include carefully skimming local newspapers for any announced changes in facility programs, staff, or hours of service; receiving bulletins or newsletters of service facilities; and discussions with friends and contacts in other service facilities.

A calendar must be established that provides for formal updating of every facility at regular intervals. The length of the interval that best suits your needs will depend on several factors – the number of facilities in your file, the stability of file information (how fast it changes), staff time available to work on updating the file, and so on. If you lack experience or knowledge about how rapidly the information in your file will change, it is suggested that at first you develop your calendar so that every facility in the file will be contacted approximately once every six or nine months for formal updating. This means that your file information is never "colder" than the six- or nine-month period of your calendar. No file should go longer than one year without complete formal updating.

You will find the cross-reference file a handy tool for the updating process. Once you have decided on the length of your updating calendar, divide the cross-reference file into some convenient set of equal parts. For example, it may work well to divide the file into three or four equal parts. Put tabs of different colors on each card to indicate a facility's status with regard to updating (this process is similar to that used in the initial stages of development of the resource file – see page 29).

For example, suppose you are going to update your file completely every nine months, and you decide to divide the file into equal thirds. This means that you will complete the updating process on the first third during the first three months, on the second third during months four through six, and the last third during months seven through nine. At month ten, you will be ready to start again on the facilities in the first third of the file. As you gain experience, you will be better able to determine what the best overall interval for updating is, and about how many facilities can conveniently be done during any one month. The most important thing to remember is that updating should be a continuous process – part of the weekly office routine in your center. Avoid the unpleasant task of a major update to be completed in a very short period of time by keeping on top of this important activity.

Updating is best accomplished by mailing the director a fresh copy of the completed facility file form and copies of the pages in the facility's resource survey booklet on which

the facility's services have been checked. Request that the copies be verified, corrected if necessary, and returned. There is space on the cross-reference file card to note the dates for this. Your secretary can do this task, working with the resource file monitor's supervision.

- If your copy of the facility file form is legible and has no penciled comments on it, you can photocopy the form.
- If your copy of the facility file form is illegible or has penciled comments, prepare a fresh copy of the form. (Some penciled comments might prove embarrassing.)

If only minor changes are reported by the facility, your secretary can communicate these changes to all staff members by means of a routing slip. She can also see that any changes in services are recorded in the facility's resource survey booklet and that copies are sent to the network coordinator. If the changes are major, a new set of facility file forms will have to be prepared and distributed. If changes in services are involved, code cards must also be changed.

If the facility checks a new service category on the facility form, thus indicating that new services are offered in a category not previously checked, it will be necessary to arrange a meeting or to mail the facility a complete copy or pertinent pages of the resource survey booklet so that the new services may be recorded.

See page 100 in the Appendix for a sample letter to accompany requests for information to update your files. A response form similar to the form on page 93 in the Appendix should also accompany this request.

From time to time, new facilities will come into existence in your community. As soon as you learn of them, they should be included in the resource file, using the same procedures that were used to create the file.

In summary

To enter changes into the resource file, the person initiating the change must contact the resource file monitor, who will:

(1) *enter the change in his copy of the facility notebook, in the master resource survey booklet, and in the filed copy of the facility's resource survey booklet;*

(2) *change all other copies of the facility file form and all other copies of the master resource survey booklet;*

(3) *(if service changes are involved) change the appropriate code card(s) in the file and/or the central code card file and in each facility notebook;*

(4) *notify the network coordinator of all changes by sending him copies of the revised materials.*

GLOSSARY

Brochure — A flier designed to explain your I&R center project to the audience of facility directors (see pages 102 and 103).

Center identifier code — A two-digit number unique to each I&R center participating in the network. This number is used as a prefix to the facility number, in order to identify the relationship of that number to the center with which it is associated.

Code — (See service code below)

Code card — A 5"x8" card prepared for each service code (see definition), for all services checked by community facilities. Each card is divided into ten numbered columns. Facility numbers of those facilities providing services designated by the service code are entered in the columns by matching the *last* digit of the facility number with the number at the top of the column (see pages 44-47 for a complete explanation).

Code card file (code file) — The file in which code cards are kept in numerical order, with card file dividers separating the service categories for easier and faster use (see pages 44-47).

Cross-reference file — The file of 3"x5" cards, in alphabetical order by facility name, originally compiled in the process of identifying community facilities to contact (see page 22). With the addition of the facility number to each card, this alphabetical file serves as a useful cross-index to the facility file and notebooks, in which facility information is filed by facility number. These file cards also contain information on contacts with the facility and whether or not the resource survey booklet for the facility has been completed or updated (see pages 29 and 66).

Cross-reference file card — The 3"x5" card with facility name, address, contact information, etc., that is stored in alphabetical order in the facility cross-reference file.

Facility — An agency, program, individual, or organization, that provides a service in the community.

Facility file — The file containing facility file forms in numerical order, by facility number. Pamphlets, brochures, notes, correspondence, and other information about the facility may also be filed in the folders containing the facility file form. This file serves as a permanent master file of information about the facility.

Facility file form (facility form) — The form for each facility that contains complete information about the facility's services, accessibility, eligibility requirements, and fees. The completed facility form is kept in a file folder. These folders are filed in numerical order by facility number in the facility file. The facility forms are reproduced by photocopy for use in each I&R specialist's facility notebook. (See Chapter 7 and pages 87-90 in the Appendix for details.)

Facility notebook — The notebook or notebooks containing copies of the facility file forms in numerical order, by facility number. Each I&R worker should have his own.

Facility number — A unique code number for each facility, assigned in consecutive order as each resource survey booklet is completed (see page 42). These numbers appear on the facility file forms, the cross-reference file cards, the completed resource survey booklets, and the appropriate code cards.

Key word index (index) — A listing of all terms used in describing the services in a resource survey booklet, alphabetized according to each key word and keyed according to the service category (or categories) in which the term appears and whether the term is used in describing a problem, a service, or both. The index is intended to be an aid in locating appropriate services for a caller in terms of the classification system used in the resource survey booklet (see InterStudy, 1972).

Master resource survey booklet (master booklet) — A master copy of "services provided" section of the resource survey booklet in which all services checked by all community facilities are colored by a pencil or marker. It reveals at a glance which services are provided and which are not provided in your community (see pages 47-48).

Monitor — (See resource file monitor below)

Network coordinator — A member of the staff of the network office who has the responsibility for working directly with member centers of the I&R network.

Network office — A central office for coordinating a network of I&R centers. This office may be part of an I&R center that provides direct

I&R services at the community level; or it may be a purely administrative and supervisory office located in county, state, or federal government.

Resource file — A collective term for all the component parts of the system for storing and retrieving information on community resources: the facility file, the facility notebooks, the code card file, the facility cross-reference file, the master resource survey booklet, and whatever other storage locations and kinds of information might be added by each center to these basic components (see Chapter 7).

Resource file monitor (monitor) — That person in the I&R center specifically designated to coordinate and make changes in all components of the resource file.

Resource survey booklet — A survey instrument for cataloging the services provided by a facility or agency (see Chapter 3).

Service code (code) — Either a numeric code or a word designated for each of the specific services contained in the classification system of a resource survey booklet.

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APPENDIX

74 *Questionnaire for Community Resources Survey*

84 *Certificate of appreciation used by Wisconsin Information Service*

85 *Cross-reference file card*

86 *Code card*

87 *Facility file form*

91 *Facility verification form*

92 *Facility reporting form*

93 *Updating form*

94 *Letter prior to telephone contact*

95 *Letter to confirm an appointment for an interview — to accompany the resource survey*

96 *Letter to accompany a mailed resource survey booklet when no interview is possible*

97 *Letter of thanks to be sent following an interview*

98 *Letter of thanks following the return of a mailed resource survey booklet*

99 *Letter explaining the need to verify the facility file form*

100 *Letter for updating the resource file*

101 *A note about form letters*

102 *Example of a brochure designed to be sent to facility directors*

104 *Where to obtain census data (Field offices of the U.S. Department of Commerce)*

105 *Areas tracted by the Census Bureau*

107 *Flow chart of the development and updating of the resource file (prepared by Mr. Larry Yunck, Systems Analyst, State of Wisconsin Department of Administration, Bureau of Budget and Planning)*

Questionnaire for Community Resources Survey

Please Note: A community resource survey is being conducted in our community in order to prepare for the opening of an information and referral center. The information secured in the survey will be used to develop a resource file that can be used in the operation of the center. The center is a demonstration project designed to develop better linkage between people and the human services they need. Please complete the questionnaire as indicated. If you have any questions, please call (phone number).

1. Agency, organization, or practitioner's name _____

2. Address _____

3. Phone number _____ 4. Director's or practitioner's name _____

5. Hours open _____ 6. Hours phone answered _____

7. Emergency phone numbers _____

8. Do you offer services or programs for older adults? Yes ____ No ____

9. In which of the following areas do you offer services? Please check as many as are relevant.

   I. Financial ____

   II. Housing ____

   III. Health ____

   IV. Home-helps ____

   V. Legal ____

   VI. Leisure time activities ____

   VII. Personal-social ____

   VIII. Transportation ____

   IX. Miscellaneous ____

      1) Taxes ____

      2) Emergencies ____

      3) General information and referral service ____

10. Within the area or areas in which you provide service, please check which of the following listed services or programs you offer. Please add any that are not listed.

I. Financial ____

A. Financial assistance--income ____

1. Emergency ____
2. Monthly cash grants ____
3. Material assistance: food, clothing & shelter (in kind) ____
4. Food stamps ____
5. Food commodities ____
6. Other ____ Please specify: _____

B. Financial insurance ____

1. Social insurance (i.e. Social Security) ____
2. Private insurance (annuities) ____
3. Union pensions and benefits ____
4. Other ____ Please specify: _____

C. Housing assistance--financial ____

1. Rent subsidies ____
2. Mortgage subsidies ____
3. Home improvement loans ____
4. Home relocation loans ____
5. Other ____ Please specify: _____

D. Medical assistance--(payment for medical services) ____

1. Private medical insurance ____
2. Financial aid ____
3. Medicare ____
4. Medicaid ____
5. Other ____ Please specify: _____

E. Employment ____

1. Job information ____
2. Job counseling ____
3. Job finding ____
4. Job referral ____
5. Part-time employment opportunities ____
6. Other ____ Please specify: _____

II. Housing ____

A. Residential housing arrangements and services ____

1. Emergency housing ____
2. Boarding home care ____
3. Nursing home or long term convalescent care ____
4. Retirement housing ____
5. Low-rent housing ____
6. Other ____ Please specify: _____

B. Housing-related services ____

1. Finding an apartment ____
2. Home purchasing and selling ____
3. Financial service ____
   a. Low cost home loans ____
   b. Mortgages ____
   c. Mortgage subsidies ____
   d. Home-relocation loans ____
   e. Insurance ____
   f. Rent subsidies ____

_____

4. Legal service ____
5. Housing information and referral services ____
6. Other ____ Please specify: _____

C. Community housing regulation services ____

1. Standard setting and licensing ____
2. Zoning ____
3. Housing code enforcement ____
4. Other ____ Please specify: _____

III. Health--general and mental health ____

A. Community health services ____

1. Communicable disease control ____
2. Community health supervision and education programs ____
3. Food, water, and housing inspection ____
4. Other ____ Please specify: _____

B. Home-health services ____

1. Visiting nurse services ____
2. Physicians home visits ____
3. Prescription deliveries ____
4. Homemaker services ____
5. Shopping service ____
6. Housekeeping services ____
7. Oldster sitting ____
8. Companion services ____
9. Other ____ Please specify:_____

C. Community health care ____

1. Emergency services ____
2. Drugs ____
3. Dental ____
4. Day care ____
5. Individual and family counseling ____
6. Group therapy ____
7. Psychological diagnosis and testing ____
8. Ear, eye, nose, throat exams and treatment ____
9. Physical exams ____
10. Other ____ Please specify: _____

D. In-patient health care (acute and chronic) ____

1. Emergency service ____
2. 24 hour nursing and boarding care ____
3. Medical care ____
4. Use of special equipment ____
5. Physical therapy ____
6. Individual and family counseling under medical auspices ____
7. Social activities ____
8. Other ____ Please specify: _____

E. Supportive services ____

1. Financial ____
   a. Medicaid ____
   b. Medicare ____
   c. Voluntary contributions ____
   d. Other ____ Please specify: _____
2. Prosthetics ____ Please specify: _____
3. Medical information and referral services ____

F. Services for chronic conditions ____

1. Alcoholism ____
2. Arthritis ____
3. Blindness ____
4. Cancer ____
5. Deafness ____
6. Diabetes ____
7. Heart ____
8. Stroke ____
9. Other ____ Please specify: _____

G. Death-related services ____

1. Death certificates ____
2. Funeral services ____
3. Wills ____
4. Autopsies ____
5. Religious counseling ____
6. Individual and family counseling ____
7. Other ____ Please specify: _____

IV. Legal ____

A. Consumer protection ____

B. Protective services ____

1. Commitment ____
2. Guardianship ____

C. General legal ____

1. Mortgages ____
2. Wills ____
3. Divorce ____

4. Legal information and referral services ____
5. Other ____ Please specify: _____

V. Transportation ____

A. Ambulance ____

B. Taxi service ____

C. Public transportation ____

D. Special transportation services ____

E. Other ____ Please specify: _____

VI. Home helps ____

A. Homemaker service ____

B. Shopping service ____

C. Meals on wheels ____

D. Housekeeping service ____

E. Companion and sitting service ____

F. Friendly visiting service ____

G. Visiting nurse service ____

H. Other ____ Please specify: _____

VII. Leisure time activities ____

A. Adult education programs ____

B. Special interest activities ____

C. Social activities ____

D. Cultural programs ____

E. Volunteer activities ____

F. Travel ____

G. Recreation ____

H. Other ____ Please specify: _____

VIII. Personal-social services ____

A. Individual and family counseling ____

B. Group therapy ___

C. Psychological testing, diagnosis, and evaluation ____

D. Day care programs ____

E. Various leisure time activities ____

F. Information and referral services on personal and social problems ____

G. Residential nursing care (nursing home) i.e., under non-medical auspices ____

H. Volunteer services ____

I. Vocational counseling ____

J. Other ____ Please specify: _____

IX. Miscellaneous ____

A. Taxes ____

1. Real estate ____
2. Income: federal, state, and local ____
3. Auto ____

B. Emergencies ____

1. Police protection ____
2. Fire protection ____
3. Health ____
4. Social ____

C. General information and referral services ____

X. Other _____

_____

_____

_____

_____

_____

11. Do you or does your agency have eligibility requirements for any of the following? If no, please disregard. If yes, please specify.

Age _____

Length of residence in community _____

Income maximums _____

Assets _____

Residence in a certain geographic area, i.e., neighborhood or suburb ____

_____

Diagnostic status (psychiatric or medical) _____

Particular ethnic or racial group membership ____

If yes, please specify: Blacks ____ Chicanos ____ Puerto Ricans ____

Indians ____ Whites ____ Other ____

Please specify: ____

Particular religious group affiliation ____

If yes, please specify: Protestants ____ Catholics ____

Jews ____ Other ____ Please specify____

12. a. Do you or does your agency maintain a waiting list for services?

Yes ____ No ____

b. About how long after the initial contact may a person expect to be seen? Please check below.

Immediately (i.e., within a day or two) ____

One week ____

One month ____

Longer than one month ____

13. a. Is your agency a government agency?

Yes ____ No ____

b. Is your agency a voluntary non-profit agency?

Yes ____ No ____

14. Is there a fee for your service or your agency's service?

Yes ____ No ____

If yes, what is it? _____

Can your fee schedule be given to us? Yes ____ No ____

15. If you are a doctor, lawyer, accountant, dentist, realtor, social worker, or psychiatrist in private practice, do you offer reduced fees for special groups?

Yes ____ No ____

16. a. If you are responding for a volunteer, civic, professional, or religious organization, does your organization have membership dues?

Yes ____ No ____

b. If yes, do you offer reduced membership rates for special groups?

Yes ____ No ____

17. Who are your agency's contact person(s) for referrals?

Name _____ Phone Number _____

Name _____ Phone Number _____

18. What is your or your agency's preferred referral procedure? Please check.

Letter ____ Phone call ____ In person personal contact ____

Card ____ Other ____ Please specify: _____

19. What is your preferred application, intake, or registration procedure? Please check.

a. Simple request for service ____

By phone ____ By personal appearance ____

In advance ____ By appointment ____

b. Presentation of official papers or documents ____

Birth certificates ____ Health insurance card ____

Income tax statement ____ Bank book ____

Mortgage statement ____ Insurance policies, card, or book ____

Other ____ Social security card ____

(Please specify) _____

20. Is your office or agency near public transportation?

Yes ____ No ____

If yes, how near? Please check below.

On busline ____
About one block from busline ____
3 blocks or more from busline ____

21. Does your office or agency have parking facilities nearby?

Yes ____ No ____

If yes, how near? Please check below.

Adjacent ____
Across the street ____
1 block away ____
More than one block away ____

Is there a charge for parking?

Yes ____ No ____

If yes, how much is it? ____

22. Does your office or agency have street level entrance?

Yes ____ No ____

If no, is there elevator service in the building in which your offices are located?

Yes ____ No ____

23. Are rest room facilities conveniently located?

Yes ____ No ____

If yes, where? Please check below.

Same floor ____
Down the hall ____
In same office ____
Other ____ Please specify: _____

24. In order to provide the necessary service, it is important to keep our records up to date. How often should we contact you to up-date our information system about your services? Please check below.

Once a month ____
Once every 6 months ____
Once every 3 months ____
Once a year ____

Certificate of Appreciation

This is to certify that

has successfully completed a training course and contributed his/her time and talents in _____ for the Wisconsin Information Service (WIS), a demonstration project to develop a statewide Information and Referral network.

In appreciation,

_____

Project Director

_____

Center Manager

93

93-A

CROSS-REFERENCE FILE CARD

FACILITY NAME:

ADDRESS:

PHONE NUMBER:

NAME/TITLE OF CONTACT:

☐☐ – ☐☐☐☐
FACILITY NUMBER

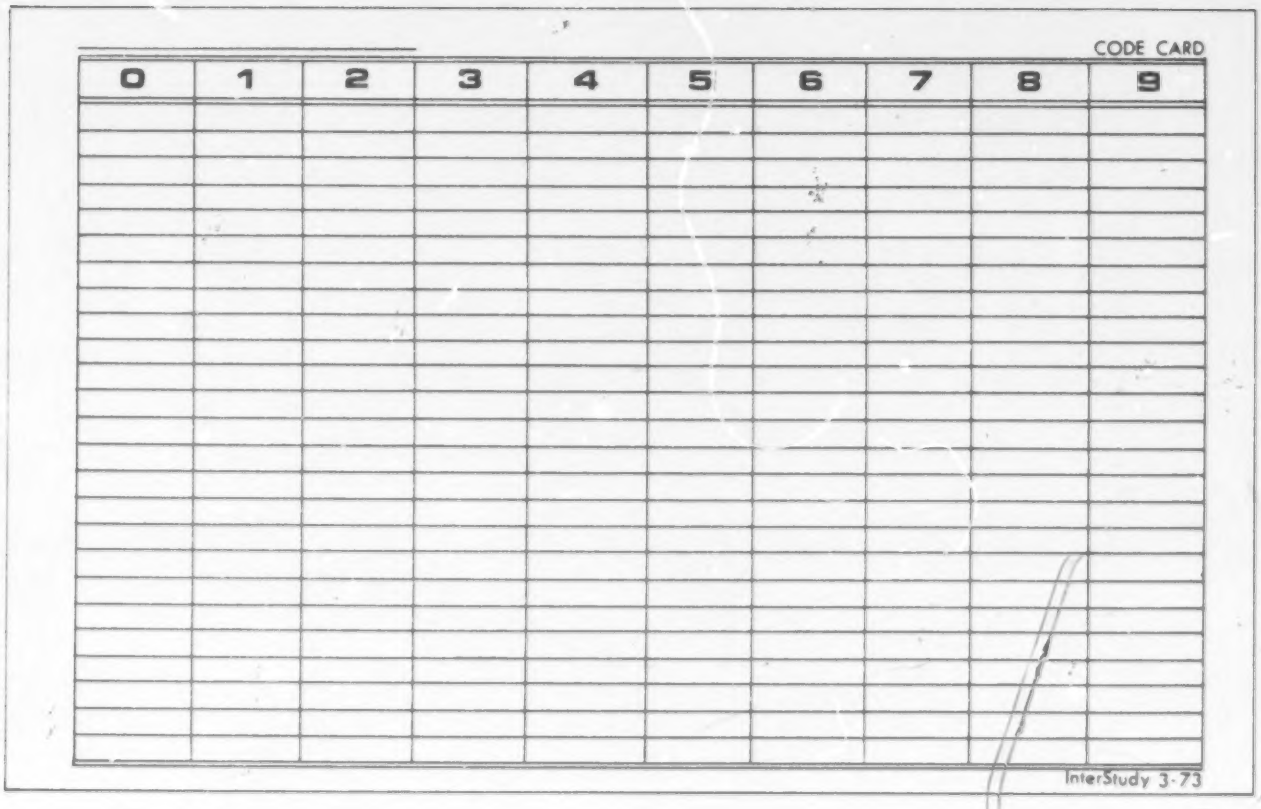
FACILITY FORM UPDATED ON:
Date ___/___/___
Date ___/___/___
Date ___/___/___
Date ___/___/___
Date ___/___/___
Date ___/___/___

DATE OF INITIAL CONTACT: ___/___/___
(MAIL ☐ PHONE ☐ OTHER ☐)
FURTHER CONTACTS (TYPE, DATE, ETC):

CHECK IF:
INVENTORY COMPLETED ☐ Date ___/___/___
SENT FOR APPROVAL ☐ Date ___/___/___
APPROVAL RECEIVED ☐ Date ___/___/___

INTERVIEWER NAME:

Cross-reference file card



Code card

FACILITY FILE FORM*

SEARCH: A Link to Services

KEYPUNCH OPERATOR: □=1 ☒=2 ○=3 FACILITY NUMBER 1 [1] [X] 2-7 [ ][ ] - [ ][ ][ ][ ]

A Facility Identification:

1 Facility name:

8-43 [ ][ ][ ][

F Eligibility Requirements:

7 Age group: 55 ☐ No restrictions 56-59 ☐☐ To ☐☐
Variations/services? 60 ☐ Yes ☐ No
P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___

8 Sexes served: 61 ☐ Males ☐ Females ○ Both
If both, are variations made for special services? 62 ☐ Yes ☐ No
P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___

9 Service regardless of marital status? 63 ☐ Yes ☐ No
Statuses served: 64 ☐ single 65 ☐ married 66 ☐ divorced
67 ☐ separated 68 ☐ widowed
Variations/services? 69 ☐ Yes ☐ No P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___

10 Families served regardless of composition? 70 ☐ Yes ☐ No
Groups **not** served: 71 ☐ married, no children 72 ☐ 1 parent, 1-2 children
73 ☐ 1 parent, 3+ children 74 ☐ 2 parents, 1-2 children,
75 ☐ 2 parents, 3+ children 76 ☐ Other _____
Variations/services? 77 ☐ Yes ☐ No P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___

→ CARD 5

11 Citizenship restrictions? 8 ☐ Yes ☐ No
Groups **not** served: 9 ☐ noncitizen 10 ☐ alien/visitors visa
11 ☐ alien/residence visa 12 ☐ illegal immigrant 13 ☐ Other _____
Variations/services? 14 ☐ Yes ☐ No P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___

12 Occupational restrictions? 15 ☐ Yes ☐ No
Groups **not** served: 16 ☐ student 17 ☐ civil serv 18 ☐ armed serv
19 ☐ this facility 20 ☐ Other _____
Variations/services? 21 ☐ Yes ☐ No P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___

13 Organization member restriction? 22 ☐ Yes ☐ No
Groups served: 23 ☐ prepaid plan 24 ☐ union
25 ☐ club or fraternal order
Variations/services? 26 ☐ Yes ☐ No P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___

14 Accept state health plan care patients? 27 ☐ Yes ☐ No
15 Accept Medicare patients? 28 ☐ Yes ☐ No
29 ☐ Accept Medicare assignment ☐ Charge in addition to Medicare assign
16 Service for anyone in county? 30 ☐ Yes ☐ No
BOUNDARIES SERVED: _____
Variations/services? 31 ☐ Yes ☐ No P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___

19 Ethnic group preference? 32 ☐ Yes ☐ No
Group(s): 33 ☐ Am Indian 34 ☐ Black 35 ☐ Caucasian 36 ☐ Oriental
37 ☐ Span 38 ☐ Other _____
Services/no preference? 39 ☐ Yes ☐ No P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___

20 Religious group preference? 40 ☐ Yes ☐ No
Group(s): 41 ☐ Catholic 42 ☐ Jewish 43 ☐ Protestant
44 ☐ Other _____
Services/no preference? 45 ☐ Yes ☐ No P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___

21 Health status requirements? 46 ☐ Yes ☐ No
CONDITIONS THAT QUALIFY: _____

22 Official papers or documents? 47 ☐ Yes ☐ No
Which required? 48 ☐ bank book 49 ☐ birth certificate
50 ☐ health ins card 51 ☐ inc tax stmt 52 ☐ ins pol/card/book
53 ☐ mortgage stmt 54 ☐ soc sec card 55 ☐ Other _____

23 County residency requirements? 56 ☐ Yes ☐ No
Length: 57 ☐ 6 mos 58 ☐ 1 year 59 ☐ over 1 year
Which services? P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___

24 State residency requirements? 60 ☐ Yes ☐ No
Length: 61 ☐ 6 mos 62 ☐ 1 year 63 ☐ over 1 year
Which services? P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___

28 Other eligibility requirements? 64 ☐ Yes ☐ No
DISQUALIFYING FACTORS: _____

G Accessibility of Services:

18 Interpreter? 65 ☐ Yes ☐ No
What languages? 66 ☐ Chinese 67 ☐ Japanese 68 ☐ Spanish
69 ☐ Other _____ Services/no interpreter? 70 ☐ Yes ☐ No
P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___, ___-___-___

25 Near public transportation? 71 ☐ Yes ☐ No
How near? 72 ☐ on busline/subway, etc. ☐ 1-3 blocks ○ 4+ blocks
26 Parking available? 73 ☐ Yes ☐ No Where? 74 ☐ adjacent
☐ across street ○ 1+ blocks Free for facility user? 75 ☐ Yes ☐ No

→ CARD 6

27 Accommodations for handicapped? 8 ☐ Yes ☐ No
Types: 9 ☐ restrooms 10 ☐ ramps 11 ☐ elevators 12 ☐ wheelchairs
13 ☐ Other _____

H Charge for Services:

17 Method: 14 ☐ full charge 15 ☐ no charge
16 ☐ token fee 17 ☐ low fee 18 ☐ percentage 19 ☐ sliding scale
Variations/services? 20 ☐ Yes ☐ No P/S CODES: ___-___-___, ___-___-___, ___-___-___, ___-___-___

I Anticipated Changes:

29 Any changes expected in next six months?
21 ☐ Yes ☐ No
WHICH RESPONSES WILL PROBABLY CHANGE? _____

J Problem/Service Codes:

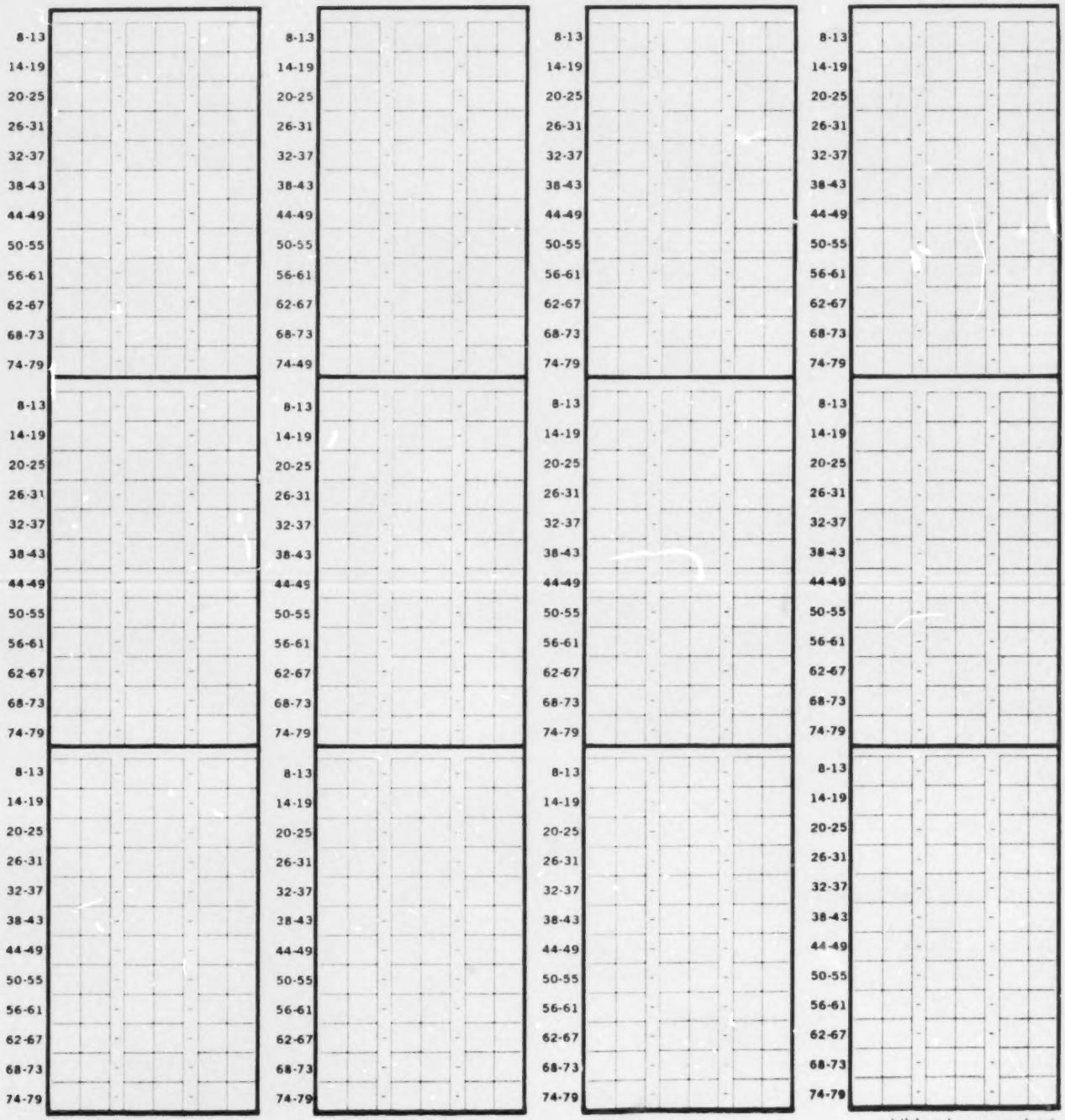
1 Date approved: 22-27 [ ][ ] - [ ][ ] - [ ][ ] (Mo. Day Yr.)

2 Date of last up-date: 28-33 [ ][ ] - [ ][ ] - [ ][ ]

3 Total number of P/S blocks: 34-37 [ ][ ][ ][ ]

4 Sheet _____ of _____

FACILITY NUMBER 1 [7 X] 2-7 [ ][ ] - [ ][ ][ ][ ]



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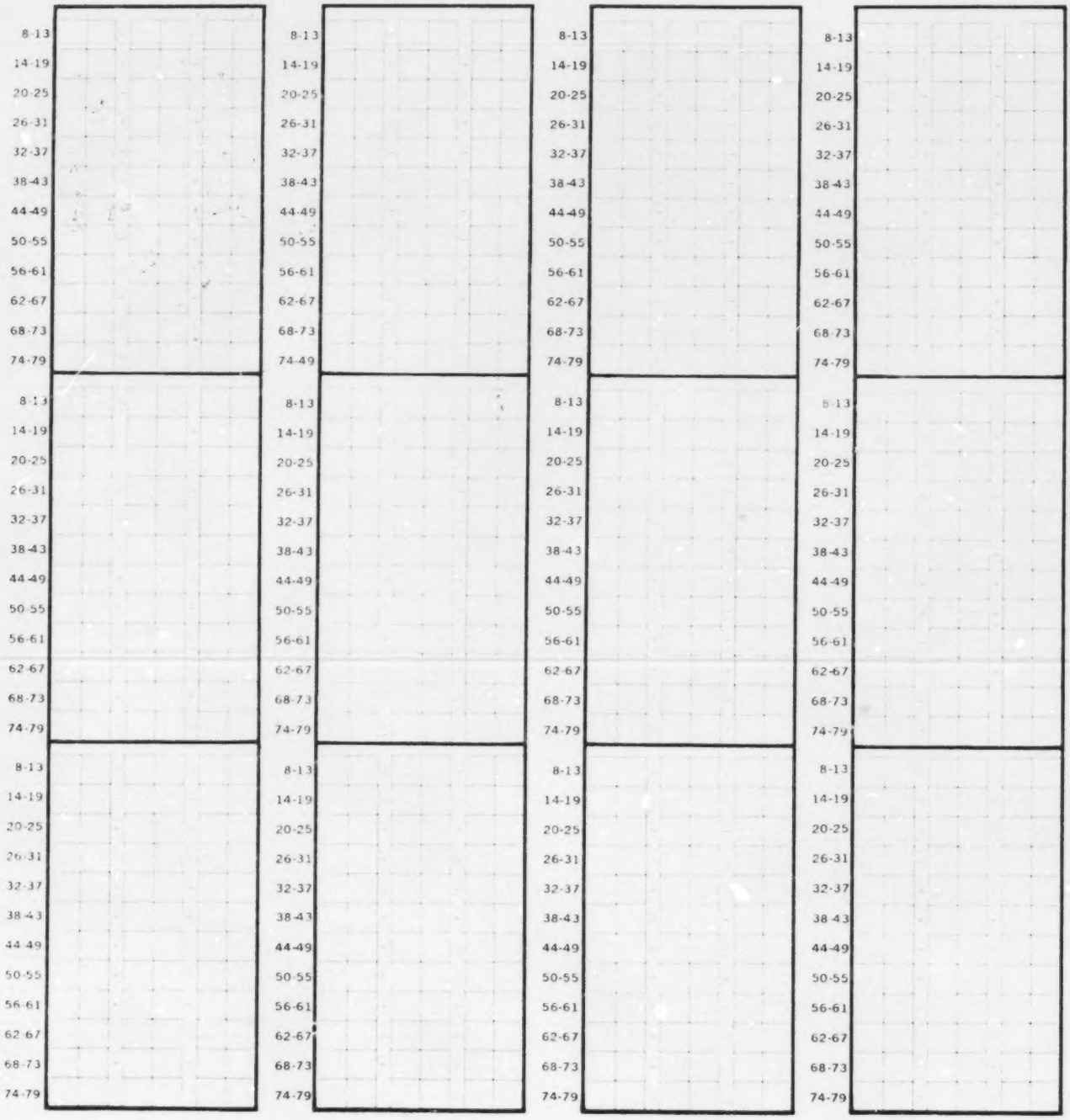
This form was designed and printed by InterStudy, 123 East Grant Street, Minneapolis, Minnesota under Grant 93-P-75051/5-03 from the Administration on Aging, Social and Rehabilitation Service, United States Department of Health, Education, and Welfare.

1-11/72


8-13
14-19
20-25
26-31
32-37
38-43
44-49
50-55
56-61
62-67
68-73
74-79

Facility Verification Form

Facility Number _____

Facility name: _____

Facility address: _____

_____

_____

Please check below whether or not the enclosed information for use in the resource file for our Wisconsin Information Service is correct.

The information is correct. _____

There are changes to be made. _____

If there are changes or additions to be made, please note them directly in the appropriate places on the enclosed copies.

Additional comments? _____

_____

_____

_____

_____
Director of Facility

_____
Date

Facility Reporting Form

Name and address of I & R center completing form:

_____

_____

_____

_____

Name and address of facility serving wide geographic area:

_____

_____

_____

_____

Facility number (include center identifier code): _____

Date of initial interview (or most recent update): _____

Is copy of facility file form attached? Yes: _____

_____
Center Director

_____
Date

Updating Form

Facility Number _____

Facility name: _____

Facility address: _____

_____

_____

Please check below if changes are to be made on your facility file form and/or information on services for use in the resource file for our Wisconsin Information Service center.

There are no changes to be made. _____

There are changes to be made. _____

If there are changes or additions to be made, please note them directly in the appropriate places on the enclosed copies and return, along with this form, in the enclosed envelope.

Additional comments? _____

_____

_____

_____

_____
Director of Facility

_____
Date

State of Wisconsin \ DEPARTMENT OF HEALTH AND SOCIAL SERVICES

DIVISION ON AGING
1 WEST WILSON STREET
MADISON, WISCONSIN 53702
INFORMATION AND REFERRAL PROJECT
55 NORTH DICKINSON STREET ROOM 166
MADISON, WISCONSIN 53703

November 10, 1973

Mr. Harlan Humphrey
Community Service Agency
RR3
Gesundheit, Wisconsin 50235

Dear Mr. Humphrey:

I am writing to request your participation in a community resource survey that is being conducted in our community by the [ ] branch of the Wisconsin Information Service (WIS) and shall be calling you in a few days to arrange for an appointment with you. The survey is being conducted to prepare for the opening of a Wisconsin Information Service center in our community. Publicity about the WIS is enclosed for your information. WIS is a demonstration project designed to improve the access of Wisconsin residents to the services they need and is being operated through the State Division on Aging, Department of Health and Social Services.

I would very much like to make an appointment for an interview with you about the services offered by your facility and shall call you sometime in the next few days to schedule an appointment with you.

Sincerely,

Dorothy Zimmerman
Center Director
Wisconsin Information Service

Letter prior to telephone contact
(see note on page 101)

State of Wisconsin \ DEPARTMENT OF HEALTH AND SOCIAL SERVICES

DIVISION ON AGING
1 WEST WILSON STREET
MADISON, WISCONSIN 53702
INFORMATION AND REFERRAL PROJECT
55 NORTH DICKINSON STREET ROOM 166
MADISON, WISCONSIN 53703

November 10, 1973

Mr. Harlan Humphrey
Community Service Agency
RR 3
Gesundheit, Wisconsin 50235

Dear Mr. Humphrey:

I am enclosing the resource survey booklet that I described to you during our recent telephone conversation. It is designed for the survey on community resources and services that is being conducted by the Wisconsin Information Service (WIS) in preparation for the opening of a WIS center in our community. Information secured in the survey will be used to develop a resource file that can be used in the operation of the center. As I explained to you, WIS is a demonstration project designed to improve the access of Wisconsin residents to the services they need and is being operated through the State Division on Aging, Department of Health and Social Services.

You may wish to examine the enclosed booklet and fill in any parts you wish before our appointment on (date) at (time), or you may wait until our appointment when I will be happy to answer any questions you may have regarding the survey or the information and referral center project. In the meantime, if you wish to contact me, I can be reached at (phone number). I am looking forward to our meeting.

Many thanks for your interest, time, and cooperation.

Sincerely,

Dorothy Zimmerman
Center Director
Wisconsin Information Service

Letter to confirm an appointment for an interview – to accompany the resource survey
(see note on page 101)

State of Wisconsin \ DEPARTMENT OF HEALTH AND SOCIAL SERVICES

DIVISION ON AGING
1 WEST WILSON STREET
MADISON, WISCONSIN 53702
INFORMATION AND REFERRAL PROJECT
55 NORTH DICKINSON STREET ROOM 166
MADISON, WISCONSIN 53703

November 10, 1973

Mr. Harlan Humphrey
Community Service Agency
RR3
Gesundheit, Wisconsin 5023

Dear Mr. Humphrey:

I am enclosing a copy of the resource survey booklet that has been designed to obtain information about resources and services available in our community. The survey is being conducted to prepare for the opening of a Wisconsin Information Service (WIS) center in our community. Information secured in the survey will be used to develop a resource file that can be used in the operation of the center. WIS is a demonstration project designed to improve the access of Wisconsin residents to the services they need. It is being operated through the State Division on Aging, Department of Health and Social Services.

We would very much appreciate your cooperation in this survey by completing the enclosed booklet by (date) and then returning it to our office in the stamped, addressed envelope. If you have any questions regarding the survey or the booklet, please call me (phone number) and I will be happy to help you in any way I can.

Thank you very much for your time, interest, and cooperation.

Sincerely,

Dorothy Zimmerman
Center Director
Wisconsin Information Service

Letter to accompany a mailed resource survey booklet when no interview is possible
(see note on page 101)

State of Wisconsin \ DEPARTMENT OF HEALTH AND SOCIAL SERVICES

DIVISION ON AGING
1 WEST WILSON STREET
MADISON, WISCONSIN 53702
INFORMATION AND REFERRAL PROJECT
55 NORTH DICKINSON STREET ROOM 166
MADISON, WISCONSIN 53703

November 10, 1973

Mr. Harlan Humphrey
Community Service Agency
RR3
Gesundheit, Wisconsin 50235

Dear Mr. Humphrey:

Thank you very much for your helpful cooperation in participating in the community resources survey that is being conducted by the Wisconsin Information Service. I enjoyed our interview and am looking forward to working with your facility in our mutual attempt to better meet the needs of the people in our community.

Again, thank you so much for your interest, time and cooperation in this important endeavor.

Sincerely,

Dorothy Zimmerman
Center Director
Wisconsin Information Service

Letter of thanks to be sent following an interview
(see note on page 101)

State of Wisconsin \ DEPARTMENT OF HEALTH AND SOCIAL SERVICES

DIVISION ON AGING
1 WEST WILSON STREET
MADISON, WISCONSIN 53702
INFORMATION AND REFERRAL PROJECT
55 NORTH DICKINSON STREET ROOM 166
MADISON, WISCONSIN 53703

November 10, 1973

Mr. Harlan Humphrey
Community Service Agency
RR3
Gesundheit, Wisconsin 50235

Dear Mr. Humphrey:

Thank you very much for your cooperation in the community resource survey that is being conducted by the Wisconsin Information Service (WIS) in preparation for the opening of a WIS center in our community.

Your time, interest, and cooperation in this important endeavor are very much appreciated.

Sincerely,

Dorothy Zimmerman
Center Director
Wisconsin Information Service

Letter of thanks following the return of a mailed resource survey booklet
(see note on page 101)

State of Wisconsin \ DEPARTMENT OF HEALTH AND SOCIAL SERVICES

DIVISION ON AGING
1 WEST WILSON STREET
MADISON, WISCONSIN 53702
INFORMATION AND REFERRAL PROJECT
55 NORTH DICKINSON STREET ROOM 166
MADISON, WISCONSIN 53703

November 10, 1973

Mr. Harlan Humphrey
Community Service Agency
RR3
Gesundheit, Wisconsin 52035

Dear Mr. Humphrey:

The resource survey booklet which your facility filled out as part of our survey of community resources has been processed. I am enclosing a copy of the summary form we have prepared for your facility, which includes a listing of the service categories you checked off during the course of our interview.

Since the accurate information will contribute greatly to the successful operation of our Wisconsin Information Service center, we would appreciate your verifying the information contained on the enclosed facility file form. Please complete and sign the enclosed facility verification form and return it to us within two weeks. If any of the information is inaccurate, please make appropriate corrections on the facility file form and return it along with the facility verification form. Should any questions arise, please call me at (phone number).

Thank you again for your cooperation.

Sincerely,

Dorothy Zimmerman
Center Director
Wisconsin Information Services

Letter explaining the need to verify the facility file form
(see note on page 101)

State of Wisconsin \ DEPARTMENT OF HEALTH AND SOCIAL SERVICES

DIVISION ON AGING
1 WEST WILSON STREET
MADISON, WISCONSIN 53702

INFORMATION AND REFERRAL PROJECT
55 NORTH DICKINSON STREET ROOM 166
MADISON, WISCONSIN 53703

November 10, 1973

Mr. Harlan Humphrey
Community Service Agency
RR3
Gesundheit, Wisconsin 50235

Dear Mr. Humphrey:

I am enclosing a copy of your facility's summary form that is being used in the resource file of our Wisconsin Information Service center. Also enclosed are copies of the resource survey booklet pages on which you indicated the services available from your facility a few months ago.

As you know, it is important that information used by our WIS center be kept current and accurate if the center is to be truly effective in linking people to the services they need. We plan to contact you about every nine months to determine any changes in your facility's program.

Would you please look over the enclosed copies of your facility's form and service information to see if corrections or additions need to be made. Return them and the enclosed facility updating form to us in the enclosed stamped, addressed envelope. If there are changes to be made, please list them directly on the forms in the appropriate spaces.

Thank you very much for your time, interest, and cooperation.

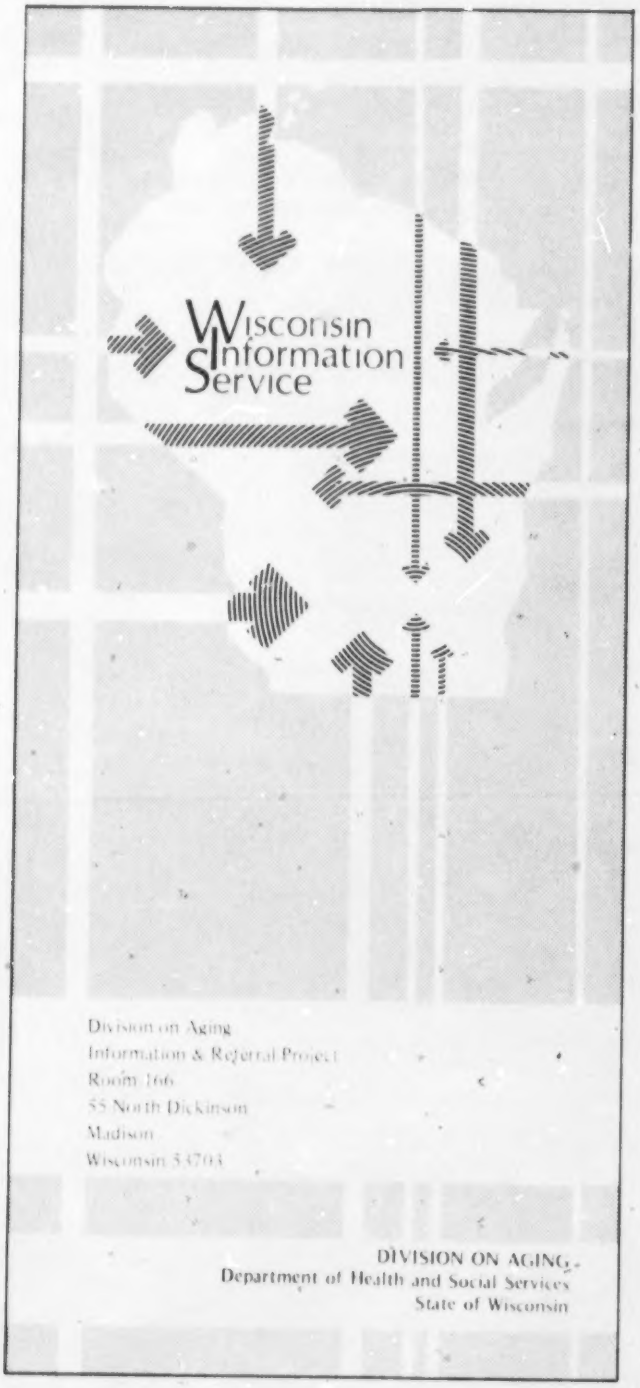
Sincerely,

Dorothy Zimmerman
Center Director
Wisconsin Information Services

Letter for updating the resource file
(see note on page 101)

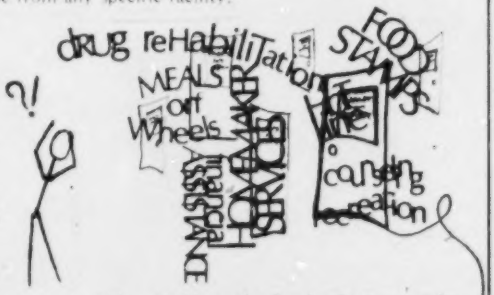
A note about form letters

These seven letters are obviously only samples; you will want to devise your own for your I & R staff to use. Remember that your center should have its own letterhead stationery and that all your correspondence – especially the correspondence represented in this Appendix – must be made on that letterhead. Remember also to type each letter; never send a letter that has been photo-copied or duplicated. Finally, use the name of the facility director, as we have in our samples, whenever you know it.

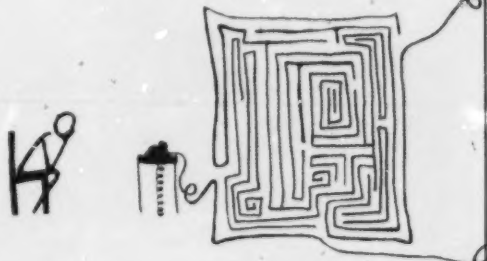


Example of the outside of a brochure designed to be sent to facility directors

The range and variety of human needs is almost limitless. To meet these needs there is a vast, unconnected system of government service agencies, private nonprofit service agencies, and facilities organized for profit as well as service. This "Service Delivery System" is made even more complex by bewildering collections of regulations that affect whether or not an applicant can receive service from any specific facility.



To a person with a problem, the Service System can be an insoluble maze. If his problem is complicated by personal limitations, such as language barriers, lack of transportation, poverty, or ill health, access to the Service System becomes nearly impossible.



One of the most promising ways to make the Service Delivery System more accessible to those who need it most is by providing "information and referral" services. Many agencies already provide some form of information and referral for those persons who contact them. However, there is growing interest in a facility specializing primarily in I & R.

I & R

INFORMATION: precise, current, complete, accurate, readily available, and appropriate.

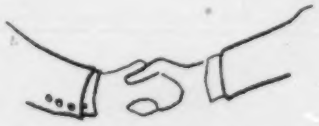
REFERRAL: directions and assistance in contacting a service facility, including making appointments or arrangements that will bring the person with a need into the system.

Wisconsin Information Service

The Wisconsin Information Service is a network of I & R centers located in private and public agency settings around the state. The operations of these I & R centers will be coordinated through a State Office in Madison, operated by the staff of the Division on Aging I & R Project.

The heart of an effective I & R center is its Resource File, which must be comprehensive and highly detailed. Each center will have a methodology for relating services available to specific problems that cause persons to seek help. All variables, such as seasonal variations, hours of availability, general eligibility requirements, fees and so on, must be included in this file. The entire Resource File will be in a form that makes providing I & R service as quick and uncomplicated as possible.

The Wisconsin Information Service is using *SEARCH: Inventory of Health Services* to obtain the needed information for the Resource File. This Inventory has been used to survey over 4,000 facilities in Los Angeles County, California.



With the cooperation of community agencies in providing detailed information for the Resource Files, WIS Centers will be providing I & R service early in 1973. This service should be an effective aid in linking people with the services they need.

Example of the inside of a brochure designed to be sent to facility directors

Where to obtain census data*

FIELD OFFICES
U.S. DEPARTMENT OF COMMERCE

Albuquerque, N. Mex. 87101, U.S. Courthouse
Anchorage, Alaska 99501, 412 Hill Building
Atlanta, Georgia 30309, 1401 Peachtree Street, N.E.
Baltimore, Md. 21202, U.S. Customhouse
Birmingham, Ala. 35205, 908 South 20th Street
Boston, Mass. 02116, 441 Stuart Street
Buffalo, N.Y. 14202, 111 West Huron Street
Charleston, S.C. 29403, 334 Meeting Street
Charleston, W. Va. 25301, 500 Quarrier Street
Cheyenne, Wyo. 82001, 2120 Capitol Avenue
Chicago, Ill. 60604, 219 South Dearborn Street
Cincinnati, Ohio 45202, 550 Main Street
Cleveland, Ohio 44114, 666 Euclid Avenue
Dallas, Tex. 75202, 1100 Commerce Street
Denver, Colo. 80202, Room 161, New Customhouse
Des Moines, Iowa 50309, 210 Walnut Street
Detroit, Mich. 48226, Federal Building
Greensboro, N.C. 27402, Federal Building
Hartford, Conn. 06103, 450 Main Street
Honolulu, Hawaii 96813, 1015 Bishop Street
Houston, Tex. 77002, 201 Fannin Street
Jacksonville, Fla. 32202, 400 West Bay Street
Kansas City, Mo. 64106, 602 East 12th Street
Los Angeles, Calif. 90024, 11000 Wilshire Blvd.
Memphis, Tenn. 38103, 147 Jefferson Avenue
Miami, Fla. 33130, 25 West Flagler Street
Milwaukee, Wis. 53203, 238 West Wisconsin Avenue
Minneapolis, Minn. 55401, 110 South Fourth Street
New Orleans, La. 70130, 610 South Street
New York, N.Y. 10007, 26 Federal Plaza, Foley Square
Philadelphia, Pa. 19107, 1015 Chestnut Street
Phoenix, Ariz. 85004, 112 North Central Street
Pittsburgh, Pa. 15222, 1000 Liberty Avenue
Portland, Oreg. 97205, 921 S.W. Washington Street
Reno, Nev. 89502, 300 Booth Street
Richmond, Va. 23240, 400 North 8th Street
St. Louis, Mo. 63103, 1520 Market Street
Salt Lake City, Utah 84111, 125 South State Street
San Francisco, Calif. 94102, 450 Golden Gate Avenue
San Juan, P.R. 00902, Post Office Building
Savannah, Ga. 31402, 125-29 Bull Street
Seattle, Wash. 98104, 909 First Avenue

*This information was obtained from the U.S. Department of Commerce and is current as of July 1972.

Areas tracted by the Census Bureau*

GEOGRAPHIC CODES		NAME
SMSA	UA	
0040	0040	ABILENE,TEX
0080	0080	AKRON,OHIO
0120	0120	ALBANY,GA
0160	0160	ALBANY-SCHENECTADY-TROY,N.Y
0200	0200	ALBUQUERQUE,N.MEX
0240	0240	ALLENTOWN-BETHLEHEM-EASTON,PA.-N.J
0280	0280	ALTOONA,PA
0320	0320	AMARILLO,TEX
0360		ANAHEIM-SANTA ANA-GARDEN GROVE,CALIF
0400	0400	ANDERSON,IND
0440	0440	ANN ARBOR,MICH
	0459	APPLETON,WIS
0460		APPLETON-OSHKOSH,WIS
0480	0480	ASHEVILLE,N.C
0520	0520	ATLANTA,GA
0560	0560	ATLANTIC CITY,N.J
0600	0600	AUGUSTA,GA.-S.C
	0620	AURORA,ILL
0640	0640	AUSTIN,TEX
0680	0680	BAKERSFIELD,CALIF
0720	0720	BALTIMORE,MD
0760	0760	BATON ROUGE,LA
0800	0800	BAY CITY,MICH
	0839	BEAUMONT,TEX
0840		BEAUMONT-PORT ARTHUR-ORANGE,TEX
0880	0880	BILLINGS,MONT
0920	0920	BILOXI-GULFPORT,MISS
	0959	BINGHAMTON,N.Y
0960		BINGHAMTON,N.Y.-PENN
1000	1000	BIRMINGHAM,ALA
1040	1040	BLOOMINGTON-NORMAL,ILL
1080	1080	BOISE CITY,IDAHO
1120	1120	BOSTON,MASS
	1130	BOULDER,COLO
1160	1160	BRIDGEPORT,CONN
1170	1170	BRISTOL,CONN
1200	1200	BROCKTON,MASS
	1239	BROWNSVILLE,TEX
1240		BROWNSVILLE-HARLINGEN-SAN BENITO,TEX
1260	1260	BRYAN-COLLEGE STATION,TEX
1280	1280	BUFFALO,N.Y
1310	1310	CAGUAS,P.R
1320	1320	CANTON,OHIO
1360	1360	CEDAR RAPIDS,IOWA
1400	1400	CHAMPAIGN-URBANA,ILL
1440	1440	CHARLESTON,S.C
1480	1480	CHARLESTON,W.VA
1520	1520	CHARLOTTE,N.C
1560	1560	CHATTANOOGA,TENN.-GA
1600		CHICAGO,ILL
	1601	CHICAGO,ILL.-NORTHWESTERN INDIANA
	1639	CINCINNATI,OHIO-KY
1640		CINCINNATI,OHIO-KY.-IND
1680	1680	CLEVELAND,OHIO
1720	1720	COLORADO SPRINGS,COLO
1740	1740	COLUMBIA,MO
1760	1760	COLUMBIA,S.C
1800	1800	COLUMBUS,GA.-ALA
1840	1840	COLUMBUS,OHIO
1880	1880	CORPUS CHRISTI,TEX
1920	1920	DALLAS,TEX
1930	1930	DANBURY,CONN
1960	1960	DAVENPORT-ROCK ISLAND-MOLINE,IOWA-ILL
2000	2000	DAYTON,OHIO
2040	2040	DECATUR,ILL
2080	2080	DENVER,COLO
2120	2120	DES MOINES,IOWA
2160	2160	DETROIT,MICH
2200		DUBUQUE,IOWA
	2201	DUBUQUE,IOWA-ILL
2240	2240	DULUTH,SUPERIOR,MINN.-WIS
2280	2280	DURHAM,N.C
2320	2320	EL PASO,TEX
2360	2360	ERIE,PA
2400	2400	EUGENE,ORE
	2439	EVANSVILLE,IND
2440		EVANSVILLE,IND.-KY
2480	2480	FALL RIVER,MASS.-R.I
2520	2520	FARGO-MOORHEAD,N.DAK.-MINN
2560	2560	FAYETTEVILLE,N.C
2600	2600	FITCHBURG-LEOMINSTER,MASS
2640	2640	FLINT,MICH
2680	2680	FORT LAUDERDALE-HOLLYWOOD,FLA
2720	2720	FORT SMITH,ARK.-OKLA
2760	2760	FORT WAYNE,IND
2800	2800	FORT WORTH,TEX
2840	2840	FRESNO,CALIF
2880	2880	GADSDEN,ALA
2900	2900	GAINESVILLE,FLA
	2919	GALVESTON,TEX
2920		GALVESTON-TEXAS CITY,TEX
2960		GARY-HAMMOND-EAST CHICAGO,IND
3000	3000	GRAND RAPIDS,MICH
3040	3040	GREAT FALLS,MONT
3080	3080	GREEN BAY,WIS
	3119	GREENSBORO,N.C
3120		GREENSBORO-WINSTON-SALEM-HIGH POINT,N.C
3160	3160	GREENVILLE,S.C
	3199	HAMILTON,OHIO
3200		HAMILTON-MIDDLETOWN,OHIO
	3230	HARLINGEN-SAN BENITO,TEX
3240	3240	HARRISBURG,PA
3280	3280	HARTFORD,CONN
	3300	HIGH POINT,N.C
3320	3320	HONOLULU,HAWAII
3360	3360	HOUSTON,TEX
3400	3400	HUNTINGTON-ASHLAND,W.VA.-KY.-OHIO
3440	3440	HUNTSVILLE,ALA
3480	3480	INDIANAPOLIS,IND
3520	3520	JACKSON,MICH
3560	3560	JACKSON,MISS
3600	3600	JACKSONVILLE,FLA
3640		JERSEY CITY,N.J
3680	3680	JOHNSTOWN,PA
	3700	JOLIET,ILL
3720	3720	KALAMAZOO,MICH
3760	3760	KANSAS CITY,MO.-KANS
3800	3800	KENOSHA,WIS
3840	3840	KNOXVILLE,TENN
3870		LA CROSSE,WIS
	3871	LACROSSE,WISC.-MINN
3880	3880	LAFAYETTE,LA
3920	3920	LAFAYETTE,WEST LAFAYETTE,IND
3960	3960	LAKE CHARLES,LA
4000	4000	LANCASTER,PA
4040	4040	LANSING,MICH
4080	4080	LAREDO,TEX
4120	4120	LAS VEGAS,NEV
4160	4160	LAWRENCE-HAVERHILL,MASS.-N.H
4200	4200	LAWTON,OKLA
4240	4240	LEWISTON,AUBURN,MAINE
4280	4280	LEXINGTON,KY
4320	4320	LIMA,OHIO
4360	4360	LINCOLN,NEBR
4400	4400	LITTLE ROCK-NORTH LITTLE ROCK,ARK
4440	4440	LORAIN-ELYRIA,OHIO
4480	4480	LOS ANGELES-LONG BEACH,CALIF
4520	4520	LOUISVILLE,KY.-IND
4560		LOWELL,MASS
	4561	LOWELL,MASS
4600	4600	LUBBOCK,TEX
4640	4640	LYNCHBURG,VA
4680	4680	MACON,GA
4720	4720	MADISON,WIS
4760	4760	MANCHESTER,N.H
4800	4800	MANSFIELD,OHIO
4840	4840	MAYAGUEZ,P.R
4880	4880	MCALLEN-PHARR-EDINBURG,TEX
4920		MEMPHIS,TENN.-ARK
	4921	MEMPHIS,TENN.-MISS
4960	4960	MERIDEN,CONN
5000	5000	MIAMI,FLA
5040	5040	MIDLAND,TEX
5080	5080	MILWAUKEE,WIS
5120	5120	MINNEAPOLIS-ST. PAUL,MINN
5160	5160	MOBILE,ALA
5170	5170	MODESTO,CALIF
5200	5200	MONROE,LA
5240	5240	MONTGOMERY,ALA
5280	5280	MUNCIE,IND
5320	5320	MUSKEGON-MUSKEGON HEIGHTS,MICH
5350	5350	NASHUA,N.H
5360	5360	NASHVILLE-DAVIDSON,TENN
5400	5400	NEW BEDFORD,MASS
5440	5440	NEW BRITAIN,CONN
5480	5480	NEW HAVEN,CONN
5520		NEW LONDON-GROTON-NORWICH,CONN
5560	5560	NEW ORLEANS,LA
5600		NEW YORK,N.Y
	5601	NEW YORK-NORTHEASTERN NEW JERSEY
5640		NEWARK,N.J
5680	5680	NEWPORT NEWS-HAMPTON,VA
5720	5720	NORFOLK-PORTSMOUTH,VA
5760	5760	NORWALK,CONN
5800	5800	ODESSA,TEX
5840	5840	OGDEN,UTAH
5880	5880	OKLAHOMA CITY,OKLA
5920	5920	OMAHA,NEBR.-IOWA
5960	5960	ORLANDO,FLA
	5970	OSHKOSH,WIS

GEOGRAPHIC IDENTIFICATION CODE SCHEME

NORTH CENTRAL 1

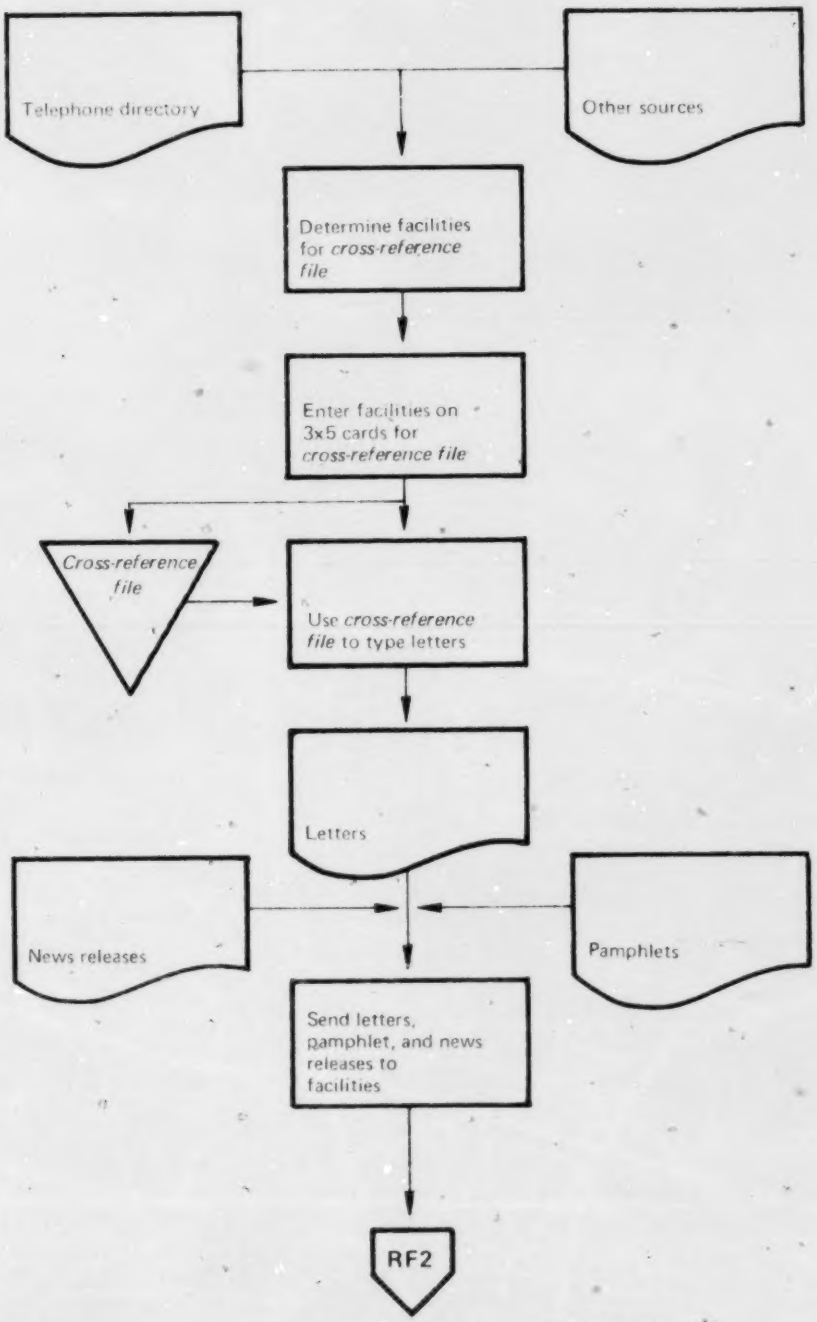
*Reproduced from U.S. Department of the Commerce, Bureau of the Census, 1972. (See References.)

Areas tracted by the Census Bureau (continued)*

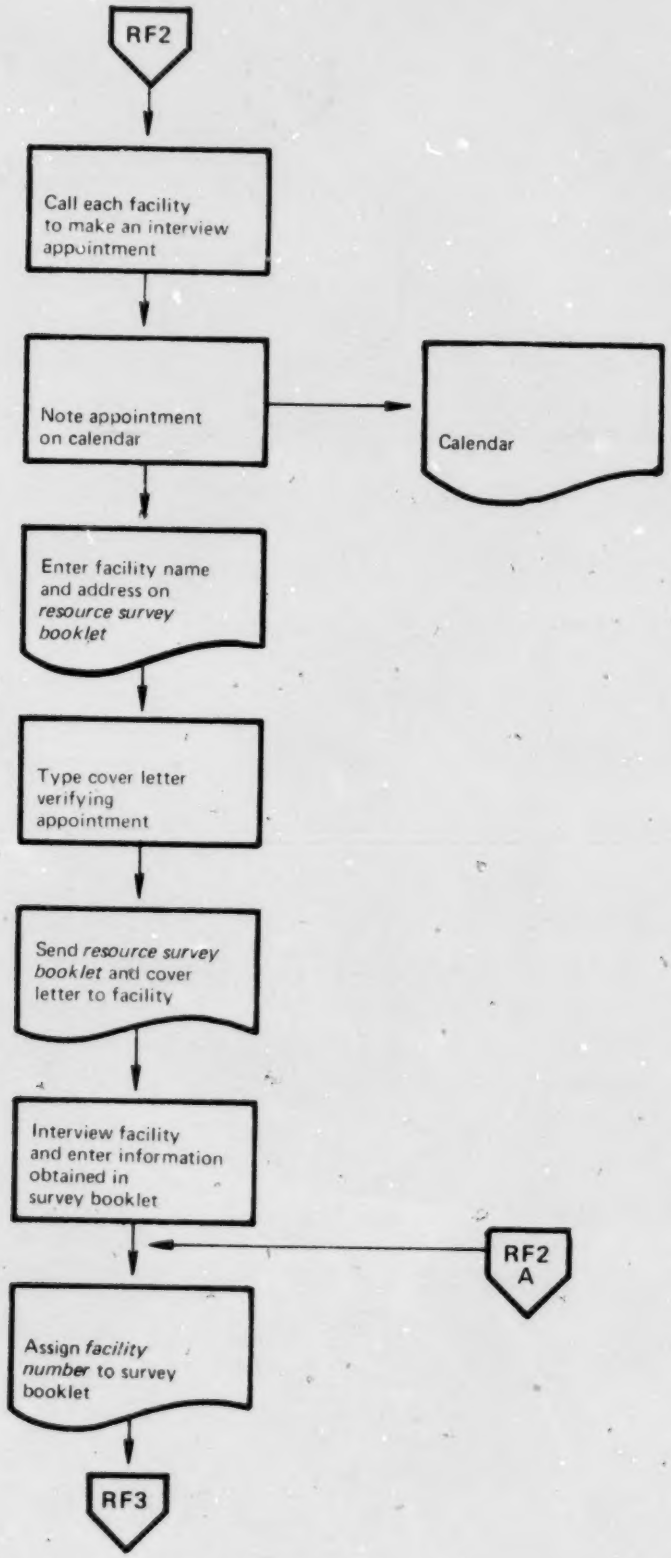
GEOGRAPHIC CODES		NAME
SMSA	UA	
5990	5990	OWENSBORO,KY
6000	6000	OXNARD-VENTURA,CALIF
6040		PATERSON-CLIFTON-PASSAIC,N J
6080	6080	PENSACOLA,FLA
6120	6120	PEORIA,ILL
6140	6140	PETERSBURG-COLONIAL HEIGHTS,VA
6160	6160	PHILADELPHIA,PA-N J
6200	6200	PHOENIX,ARIZ
6240	6240	PINE BLUFF,ARK
6280	6280	PITTSBURGH,PA
6320	6320	PITTSFIELD,MASS
6360	6360	PONCE,P R
	6380	PORT ARTHUR,TEX
6400	6400	PORTLAND,MAINE
6440	6440	PORTLAND,OREG-WASH
6480	6480	PROVIDENCE-PAWTUCKET-WARWICK,R I-MASS
6520	6520	PROVO-OREM,UTAH
6560	6560	PUEBLO,COLO
6600	6600	RACINE,WIS
6640	6640	RALEIGH,N C
6680	6680	READING,PA
6720	6720	RENO,NEV
6760	6760	RICHMOND,VA
6800	6800	ROANOKE,VA
6820	6820	ROCHESTER,MINN
6840	6840	ROCHESTER,N Y
6880	6880	ROCKFORD,ILL
6920	6920	SACRAMENTO,CALIF
6960	6960	SAGINAW,MICH
7000		SAINT JOSEPH,MO
	7001	SAINT JOSEPH,MO-KANS
7040	7040	SAINT LOUIS,MO-ILL
	7060	SAINT PETERSBURG,FLA
7080	7080	SALEM,OREG
	7119	SALINAS,CALIF
7120		SALINAS-MONTEREY,CALIF
7160	7160	SALT LAKE CITY,UTAH
7200	7200	SAN ANGELO,TEX
7240	7240	SAN ANTONIO,TEX
	7279	SAN BERNARDINO-RIVERSIDE,CALIF
7280		SAN BERNARDINO-RIVERSIDE-ONTARIO,CALIF
7320	7320	SAN DIEGO,CALIF
7360	7360	SAN FRANCISCO-OAKLAND,CALIF
7400	7400	SAN JOSE,CALIF
7440	7440	SAN JUAN,P R
7480	7480	SANTA BARBARA,CALIF
7500	7500	SANTA ROSA,CALIF
7520	7520	SAVANNAH,GA
7560	7560	SCRANTON,PA
	7580	SEASIDE-MONTEREY,CALIF
7600	7600	SEATTLE-EVERETT,WASH
7640	7640	SHERMAN-DENISON,TEX
7680	7680	SHREVEPORT,LA
	7700	SIMI VALLEY,CALIF
7720		SIOUX CITY,IOWA-NEBR
	7721	SIOUX CITY,IOWA-NEBR-S DAK
7760	7760	SIOUX FALLS,S DAK
7800		SOUTH BEND,IND
	7801	SOUTH BEND,IND-MICH
7840	7840	SPOKANE,WASH
7880	7880	SPRINGFIELD,ILL
7920	7920	SPRINGFIELD,MO
7960	7960	SPRINGFIELD,OHIO
8000	8000	SPRINGFIELD-CHICOPEE-HOLYOKE,MASS-CONN
8040	8040	STAMFORD,CONN
8080	8080	STEUBENVILLE-WEIRTON,OHIO-W VA
8120	8120	STOCKTON,CALIF
8160	8160	SYRACUSE,N Y
8200	8200	TACOMA,WASH
8240	8240	TALLAHASSEE,FLA
	8279	TAMPA,FLA
8280		TAMPA-ST PETERSBURG,FLA
8320	8320	TERRE HAUTE,IND
8360	8360	TEXARKANA,TEX-ARK
	8380	TEXAS CITY,LA-MARQUE,TEX
8400	8400	TOLEDO,OHIO-MICH
8440	8440	TOPEKA,KANS
8480		TRENTON,N J
	8481	TRENTON,N J-PENN
8520	8520	TUCSON,ARIZ
8560	8560	TULSA,OKLA
8600	8600	TUSCALOOSA,ALA
8640	8640	TYLER,TEX
8680	8680	UTICA-ROME,N Y
8720		VALLEJO-NAPA,CALIF
	8760	VINELAND-MILLVILLE-NEW JERSEY
8760		VINELAND-MILLVILLE-BRIDGETON,N J
8800	8800	WACO,TEX
8840	8840	WASHINGTON,D C-MARYLAND-VIRGINIA
8880	8880	WATERBURY,CONN
8920	8920	WATERLOO,IOWA
8960	8960	WEST PALM BEACH,FLA
9000	9000	WHEELING,W VA-OHIO
9040	9040	WICHITA,KANS
9080	9080	WICHITA FALLS,TEX
	9119	WILKES-BARRE,PA
9120		WILKES-BARRE-HAZLETON,PA
	9160	WILMINGTON,DEL-NEW JERSEY
9160		WILMINGTON,DEL-N J-MD
9200	9200	WILMINGTON,N C
	9230	WINSTON-SALEM,N C
9240	9240	WORCESTER,MASS
9280	9280	YORK,PA
9320	9320	YOUNGSTOWN-WARREN,OHIO

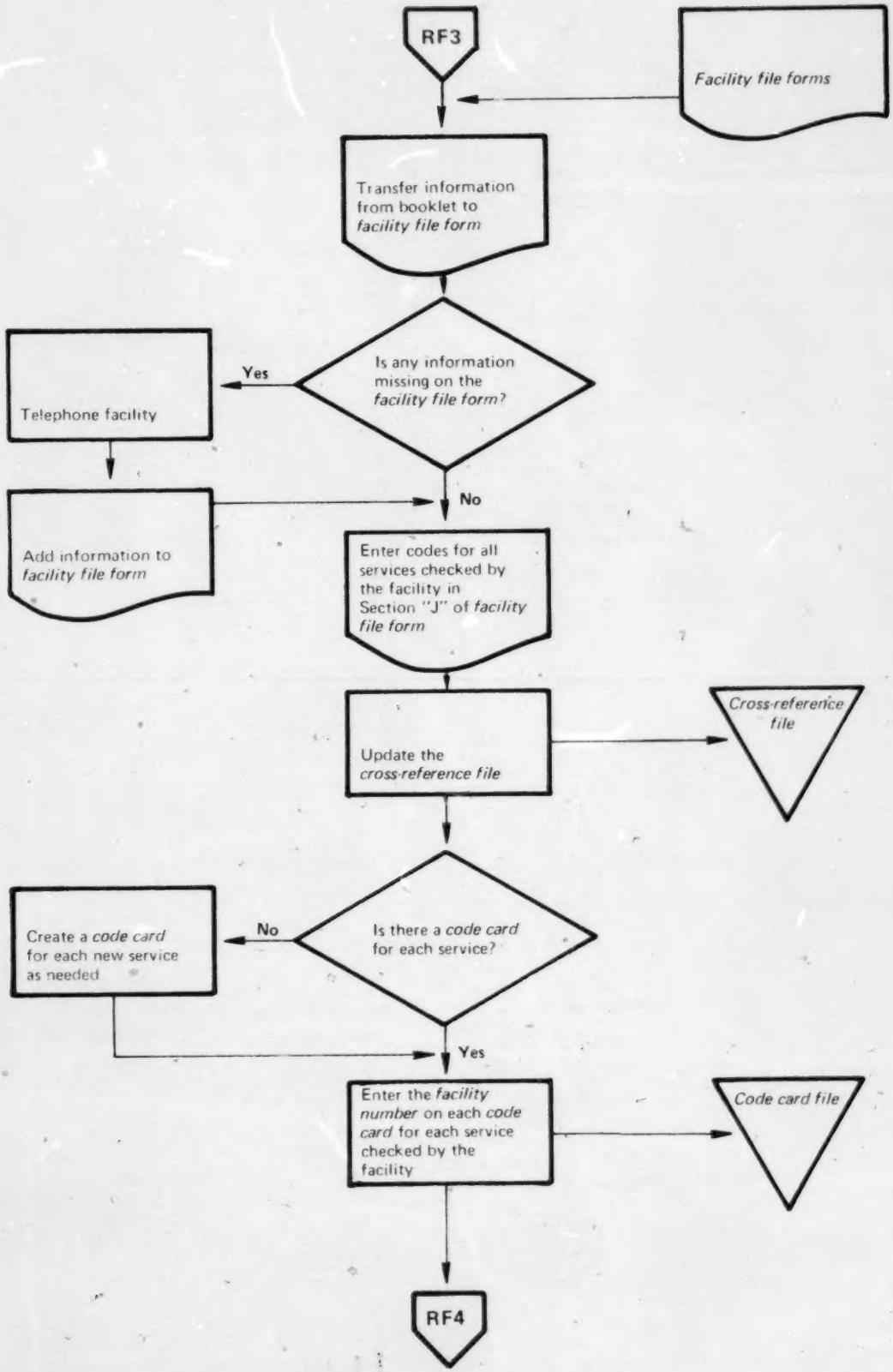
*Reproduced from U.S. Department of Commerce, Bureau of the Census, 1972.

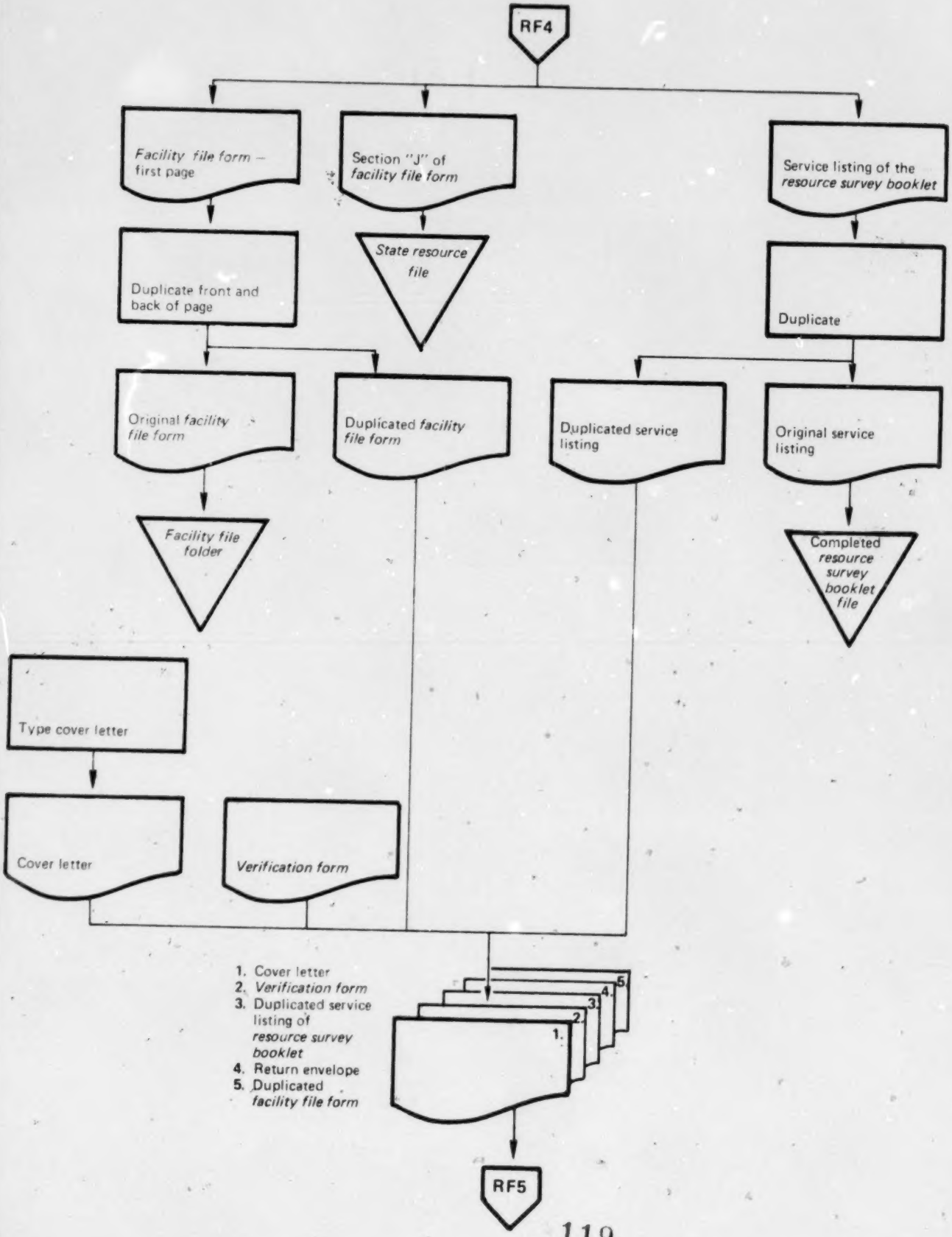
DEVELOPING AND UPDATING THE RESOURCE FILE*

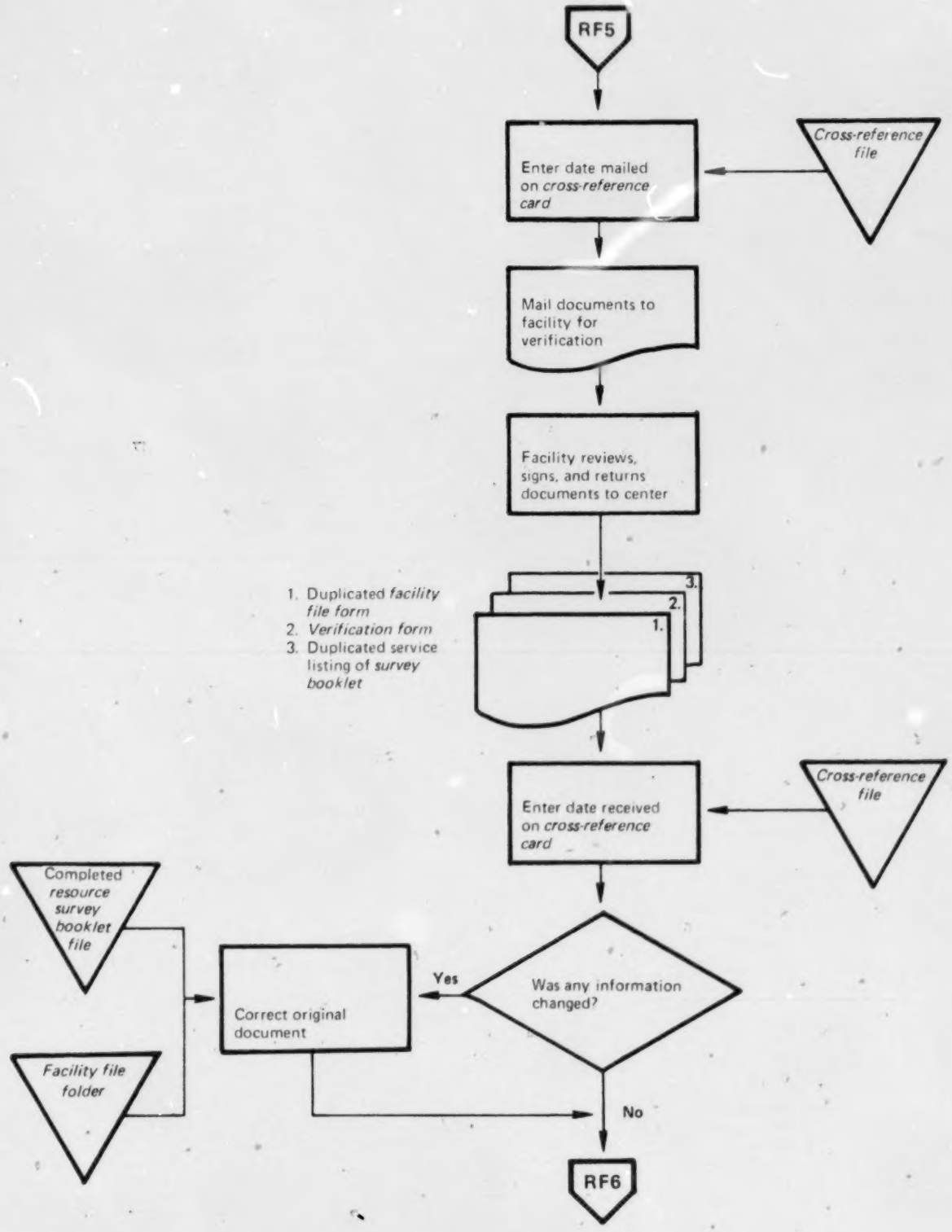


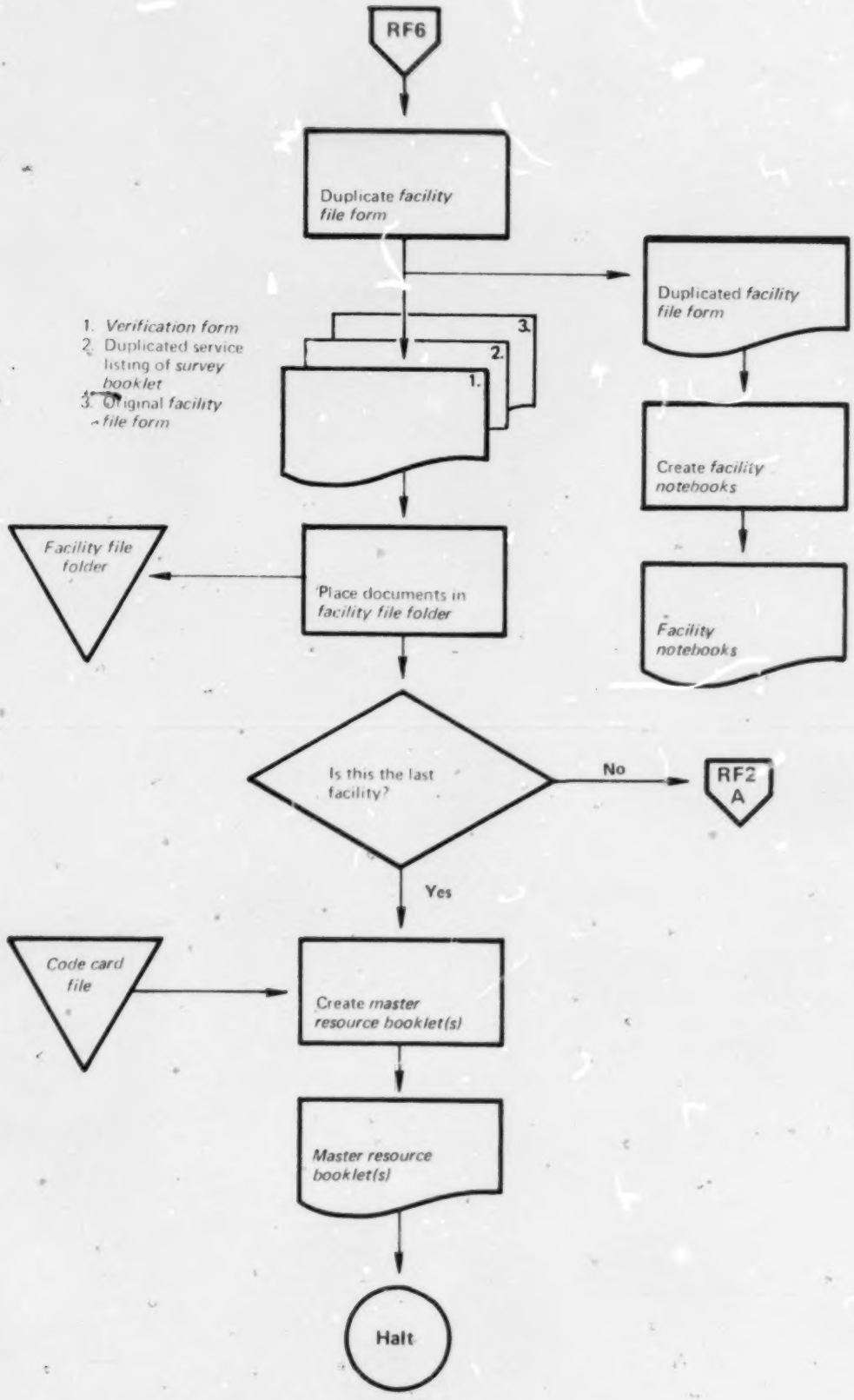
*Prepared by Mr. Larry Yunck, Systems Analyst, State of Wisconsin Department of Administration, Bureau of Budget and Planning.


RF2
Call each facility to make an interview appointment
Note appointment on calendar
Calendar
Enter facility name and address on *resource survey booklet*
Type cover letter verifying appointment
Send *resource survey booklet* and cover letter to facility
Interview facility and enter information obtained in survey booklet
RF2 A
Assign *facility number* to survey booklet
RF3

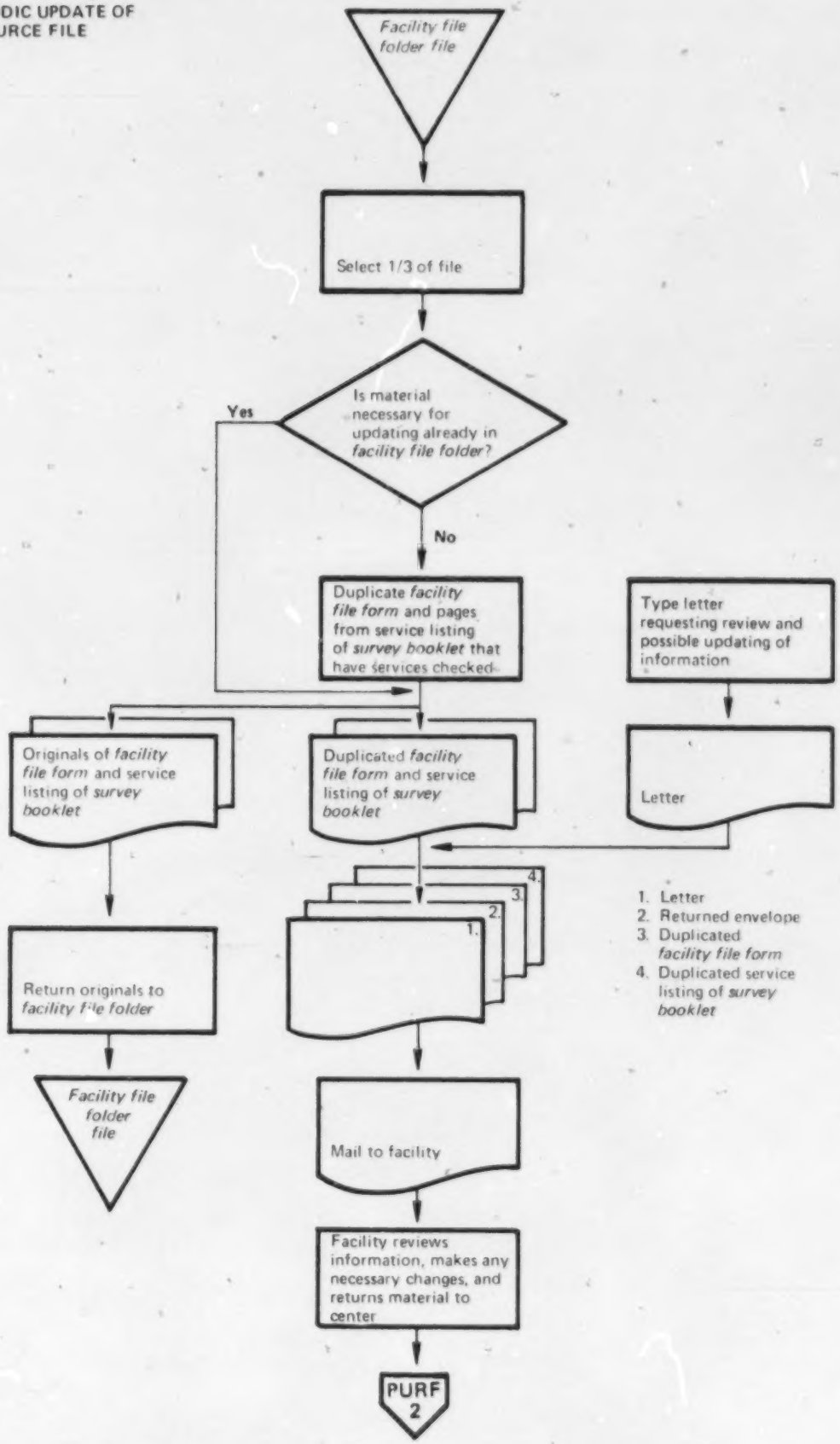

RF3
Facility file forms
Transfer information from booklet to facility file form
Is any information missing on the facility file form?
Yes
Telephone facility
Add information to facility file form
No
Enter codes for all services checked by the facility in Section "J" of facility file form
Update the cross-reference file
Cross-reference file
Is there a code card for each service?
No
Create a code card for each new service as needed
Yes
Enter the facility number on each code card for each service checked by the facility
Code card file
RF4

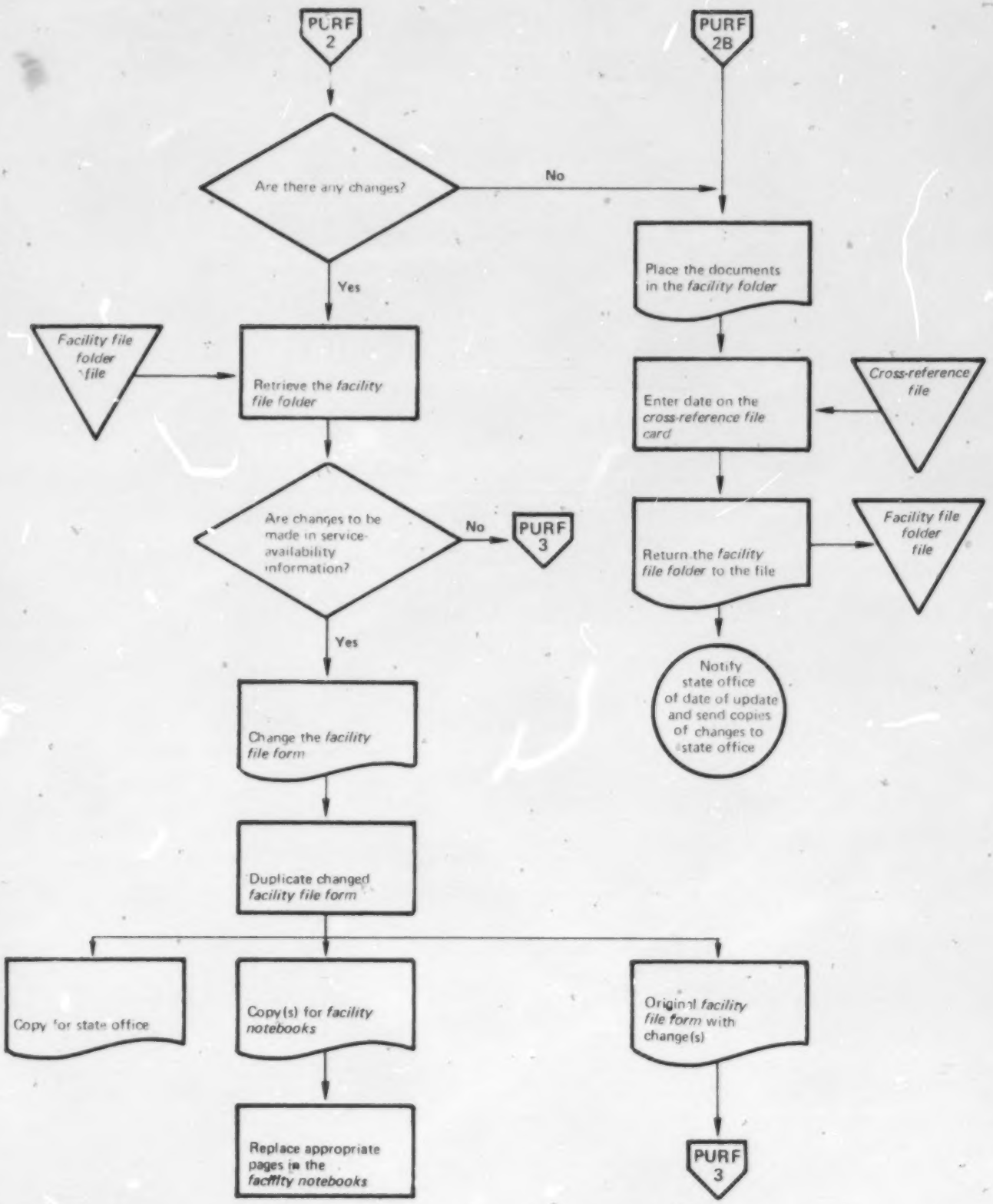

RF4
Facility file form — first page
Section "J" of facility file form
Service listing of the resource survey booklet
Duplicate front and back of page
State resource file
Duplicate
Original facility file form
Duplicated facility file form
Duplicated service listing
Original service listing
Facility file folder
Completed resource survey booklet file
Type cover letter
Cover letter
Verification form
1. Cover letter
2. Verification form
3. Duplicated service listing of resource survey booklet
4. Return envelope
5. Duplicated facility file form
RF5

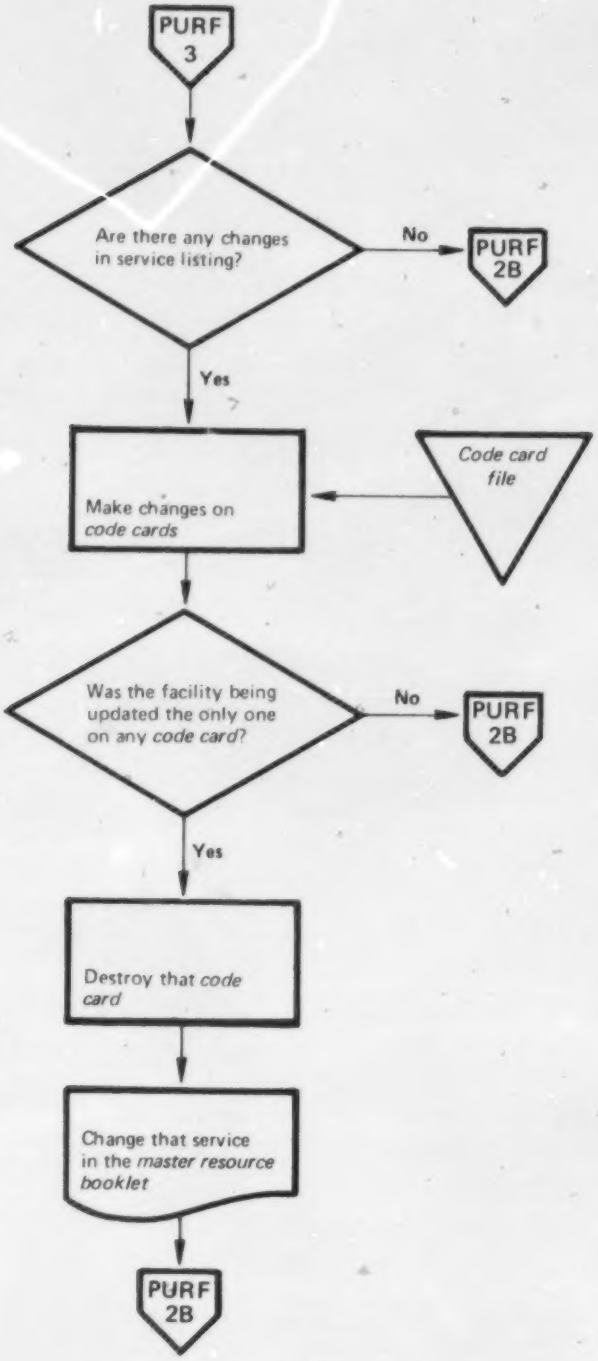

RF5
Enter date mailed on cross-reference card
Cross-reference file
Mail documents to facility for verification
Facility reviews, signs, and returns documents to center
1. Duplicated facility file form
2. Verification form
3. Duplicated service listing of survey booklet
3.
2.
1.
Enter date received on cross-reference card
Cross-reference file
Completed resource survey booklet file
Facility file folder
Correct original document
Yes
Was any information changed?
No
RF6


RF6
Duplicate facility file form
Duplicated facility file form
1. Verification form
2. Duplicated service listing of survey booklet
3. Original facility file form
3.
2.
1.
Create facility notebooks
Facility file folder
Place documents in facility file folder
Facility notebooks
Is this the last facility?
No
RF2 A
Yes
Code card file
Create master resource booklet(s)
Master resource booklet(s)
Halt

PERIODIC UPDATE OF RESOURCE FILE


Facility file folder file
Select 1/3 of file
Is material necessary for updating already in facility file folder?
Yes
No
Duplicate facility file form and pages from service listing of survey booklet that have services checked
Type letter requesting review and possible updating of information
Originals of facility file form and service listing of survey booklet
Duplicated facility file form and service listing of survey booklet
Letter
1. Letter
2. Returned envelope
3. Duplicated facility file form
4. Duplicated service listing of survey booklet
Return originals to facility file folder
Facility file folder file
Mail to facility
Facility reviews information, makes any necessary changes, and returns material to center
PURF 2


PURF 2
Are there any changes?
No
Yes
Facility file folder file
Retrieve the facility file folder
Are changes to be made in service-availability information?
No
PURF 3
Yes
Change the facility file form
Duplicate changed facility file form
Copy for state office
Copy(s) for facility notebooks
Replace appropriate pages in the facility notebooks
PURF 2B
Place the documents in the facility folder
Enter date on the cross-reference file card
Cross-reference file
Return the facility file folder to the file
Facility file folder file
Notify state office of date of update and send copies of changes to state office
Original facility file form with change(s)
PURF 3



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